SOURCING PROJECTS

User Manual

ivalua

CONTENTS

CREATING AND MANAGING SOURCING PROJECTS

Sourcing Project Module

Overview

The Sourcing Project module allows the Purchasing Department to create and manage sourcing projects that include all or parts of the following:

- Generating the project (team, currencies, project milestones, documentation, etc.)
- Gathering requirements
- Selecting the suppliers
- Setting up the RFx
- Following up and analyzing responses
- Conducting further negotiations and/or a reverse auction (when the module is included in the solution)
- Awarding lots
- Signing contracts, updating catalog pricing, and/or updating initial purchase requisition
- Evaluating the suppliers

The *steps* of a *sourcing project* are determined by the type of sourcing project (refer to *Sourcing Project type*, page 13).

Accessing the Sourcing Project module

Select the *Sourcing / Browse Sourcing Projects* menu. A list of your Sourcing Projects displays.

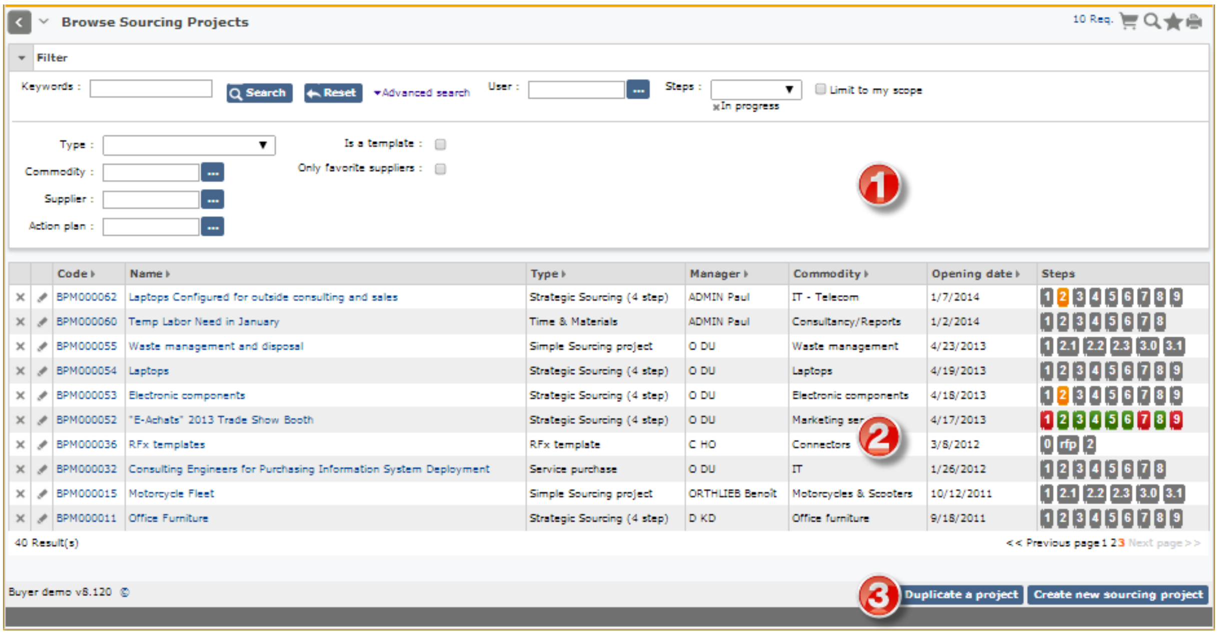
Getting Familiar With the List of Sourcing Projects

The *Browse Sourcing Projects* page is a search page, and includes:

1 Search filters

2 Search results

3 Action bar



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Search Filters

This section allows you to refine your search according to various characteristics of the projects.

Search Results

This is the list of projects compatible to the specifics entered in the search field entry.

The following table maps the search results:

Column	Description
Right-click on the upper right corner of the list	Access to the following functions ▪ *Show/Hide column:* allows you to select the specific columns you want to display ▪ *Export to Excel Format*: allows you to output the list so it can be shared with others (including both shown and hidden columns)
	Delete project (You will be prompted to confirm the action)
	Open the selected project
Code	Identifies the project (sourcing project prefix + number) Sourcing project prefix is a parameter that can be changed by the administrator
Name	Labelling of the Project
Type	Different project types have different steps and values
Manager	Project owner
Commodity	The kinds of products/services being sourced
Opening date	Bid open date of the project
Status	Visual indicator of the progress of your project by stages

Action Bar

Button	Description
Create new sourcing project	Generate a new sourcing project. *(refer to: Creating a blank project, page 21)*
Duplicate a project	Allows you to create a new project by duplication of an existing one. (*refer to: Creating a new project by duplication, page 22*)

Searching for Sourcing Projects

The search section allows you to enter specific fields in order to filter your project search. These filters help you to narrow your search to a specific project or group of projects that contain certain similarities.

1. Define your search criteria by selecting the appropriate filters.
2. Click on **Search** to start. Results matching your search specifications will be in the Result list.
   To cancel your filters and get back to the original setting, click on **Reset.**

Opening a Project

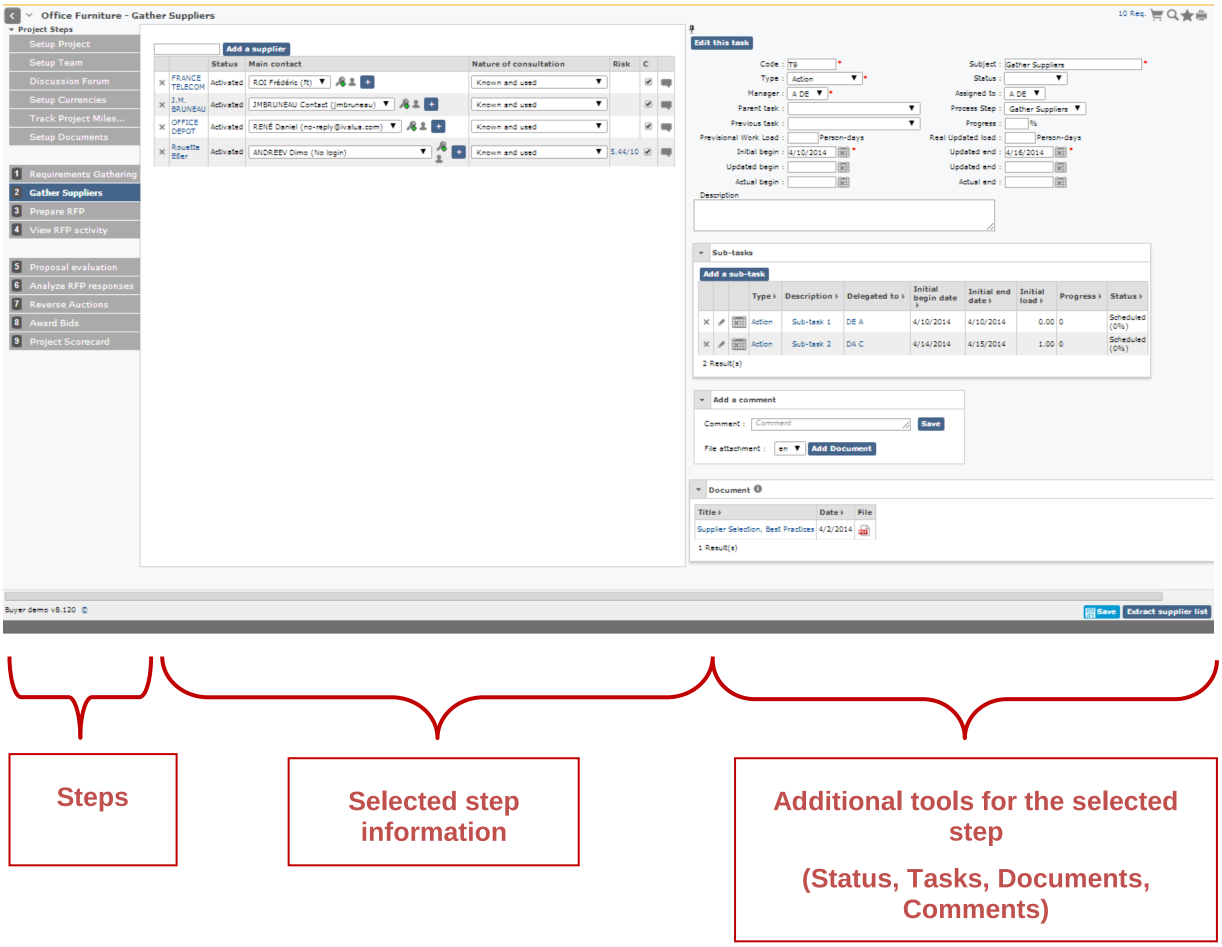
1. Go to *Browse Sourcing Projects* screen, search for a Sourcing Project.
2. Click on the project's label or its icon *Modify* . The project will open.

Elements of a Project

The screen is broken down into 3 parts:

- Left side: project steps
- Center: content of the selected step of the project
- Right side: (depending on configuration) each step can also include additional tools (Progress, Tasks, Documents, Comments)

To display a particular step of a project, click on its name on the Left side of the screen.



Sourcing Project Types

IVALUA can manage various Sourcing Project types.

The Sourcing Project type determines the specific steps and their order in the Sourcing Project. It is a template for the overall Sourcing Process that the entire organization can use as a starting point for organizing their sourcing projects.

Authorization for access of certain Sourcing Project types can be granted based on user's profile.

Authorized user profiles have the ability to change the type of a Sourcing Project at any time.

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Different Steps of a Sourcing Project

The following is a brief description of the different sourcing project steps:

Step	***Description***
Set up Project	Contains the information that defines major characteristics of the Sourcing Project: name, type, purchasing category, scope, etc.
Set up Team	View/select the user contacts associated to the Sourcing Project and their respective roles
Discussion Forum	Offers a message forum, allowing all participants to ask/answer questions or share other information
Set up Currencies	Select the reference currency for the Sourcing Project and the allowed bidding currencies
Project Schedule	Shows milestone forecast of the project. This allows for a better follow-up and side to side comparison between forecast vs. actual schedule
Set up Documents	Link different documents to the project (general, specific or related to the project)
Requirements	Conduct an internal survey for the needs of the projects
Gather Suppliers	Identify suppliers that may be invited to bid
Prepare RFx	Define and send a complex request including for item quotes (RFP) and for questions (RFI).
View RFx activity	After sending a RFx, you can track supplier go to this step to: ▪ Track suppliers' bidding activity ▪ Track the evaluation of suppliers' answers to the questionnaire
Questionnaire answers	Review and score questionnaire answers
Analyze & Award	Conduct an in-depth analysis of supplier proposals ▪ Decide to pursue negotiations with a new round of RFx or by organizing a reverse auction ▪ Decide to award contracts using scenario and decision-support tools
Reverse Auctions	Move shortlisted suppliers to a reverse auction event (create a reverse auction, define options, and track auctions in progress). When auctions are created in a project, the Auction step presents a list of auctions linked to the project.
Synthesis	View a summary of the sourcing project's outcome Savings results are presented by lot and item (calculated based on the award price and the target price input on the *Items* tab of the RFx). This step also includes a summary of the amounts awarded by supplier and allows for the user to notify suppliers who have not been awarded.

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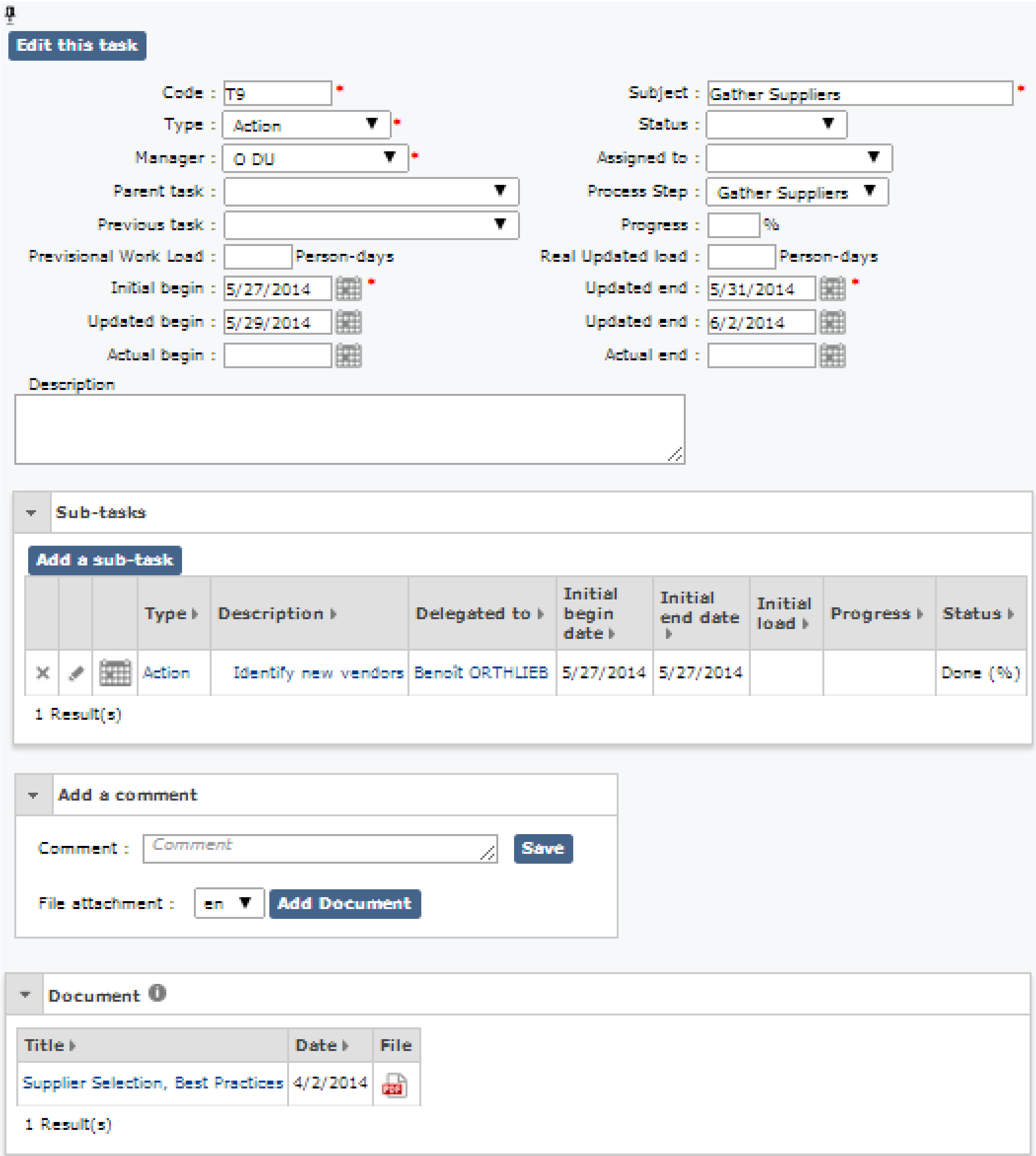
Additional Tools Associated With the Steps of a Sourcing Project

Depending on your settings the steps of the sourcing project may have a panel of additional tools. The panel can be reduced or expanded using an icon (or).

If you have this panel it will be on the right of the screen and includes these tools:

- Tasks
- Documents
- Comments and file attachments



This section of the manual describes these tools and their use.

Managing Step-Linked Tasks

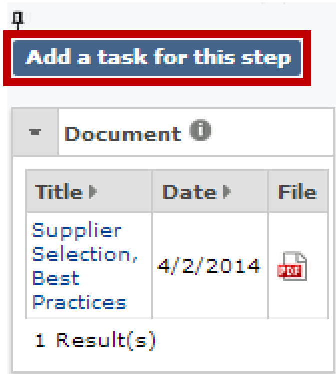
Principles

For each Sourcing Project's step that has the tools panel enabled, you have the ability to define a main task, representing the step itself, as well as related sub-tasks.

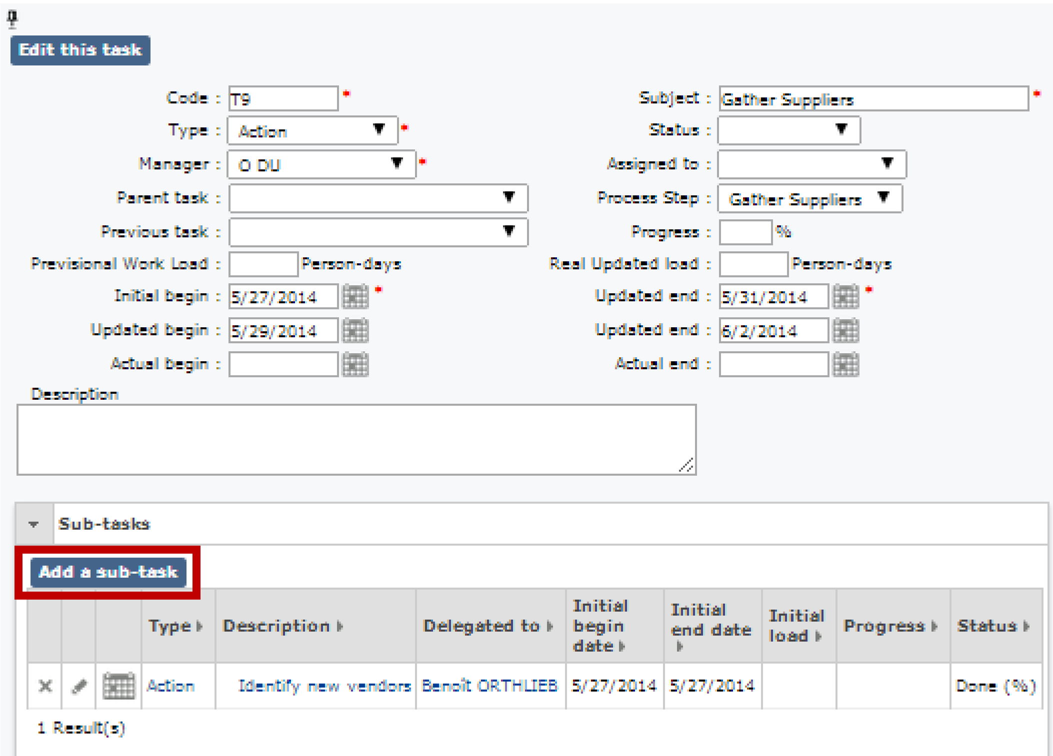
Step tasks can be created and managed directly in the relevant step, or else in the *Project Schedule* step, which contains the overall Sourcing Project's schedule. Whenever tasks are edited in the step they relate to, modifications are automatically mirrored in the overall schedule, and vice versa.

Creating Tasks and Sub-Tasks

If a step's main task has not yet been created, the right pane will include a button labeled **Add a task for this step**. Use this button to create the step's main task.



Once the main task is created, a button allowing you to create sub-tasks will become available.



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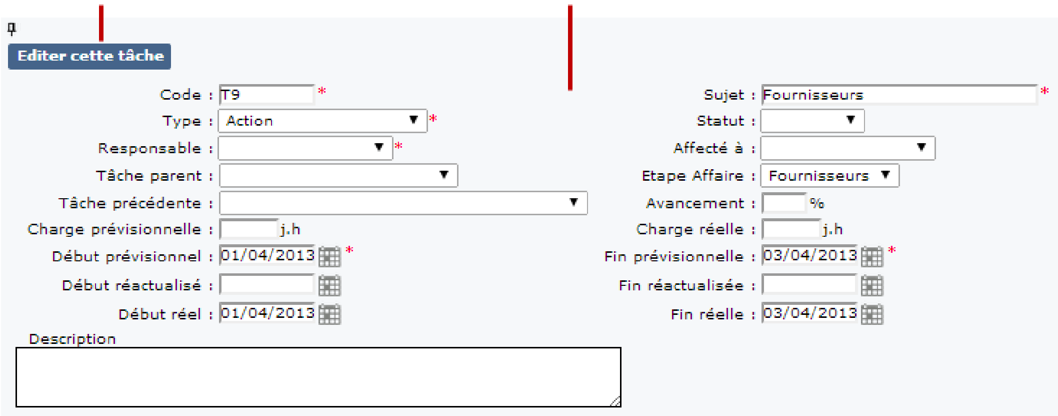
Editing Tasks and Sub-Tasks

The main settings of a task can be accessed directly in the step's additional tools pane.

To access all the task's settings, click the button **Edit this task**.

Access all the task settings **Main task settings**



To edit a sub-task, click its *Edit* icon.

See also

For further information on the Sourcing Project's overall schedule, and on how to create and manage tasks, see *PROJECT SCHEDULE Step,* page 38)

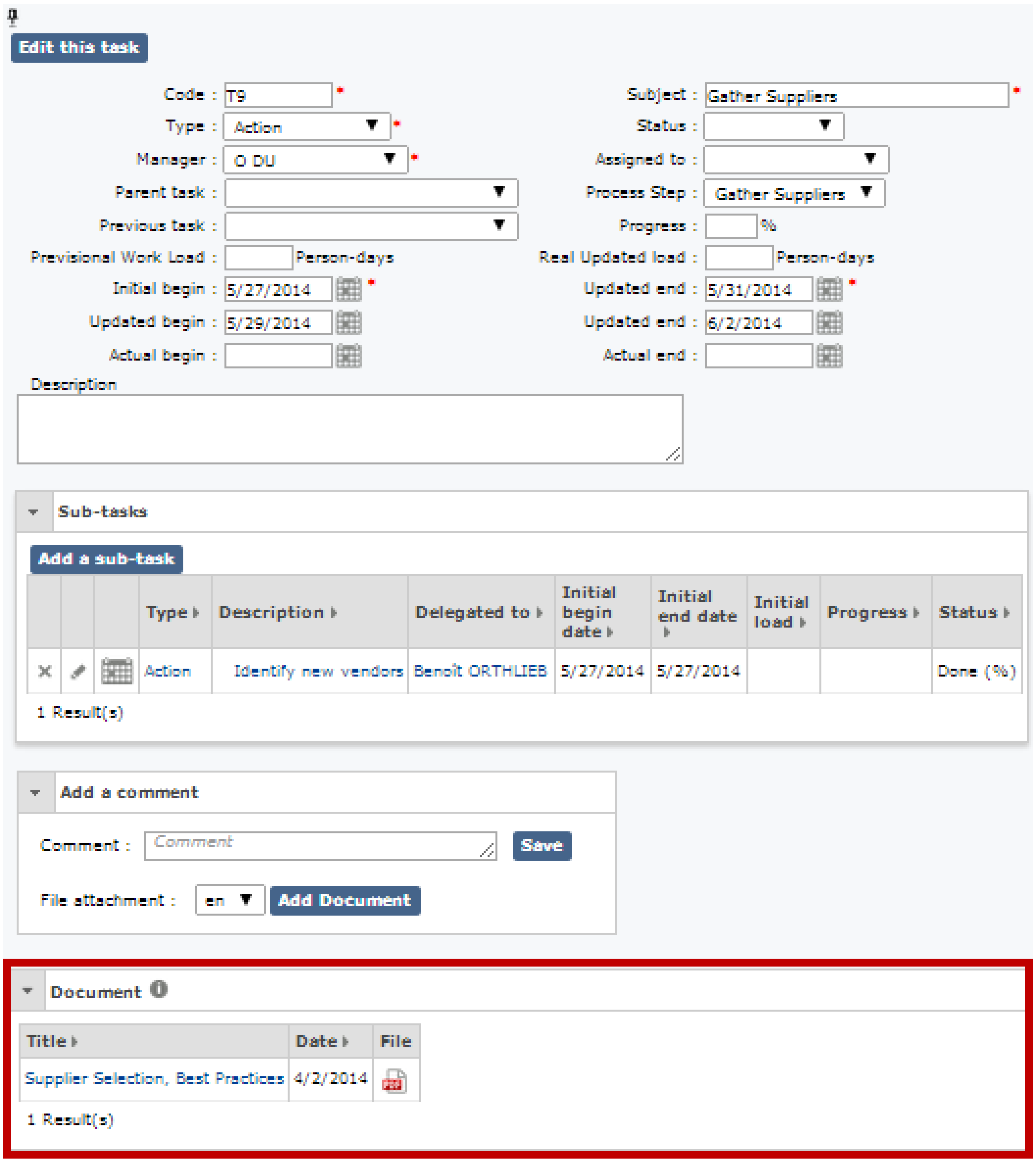
Viewing Knowledge Base documents Linked to a Step

The *Documents* section lists documents that are specifically linked to the step.

This material is made available to users collaborating on the Sourcing Project.

Click the document title or any attachment to open it.

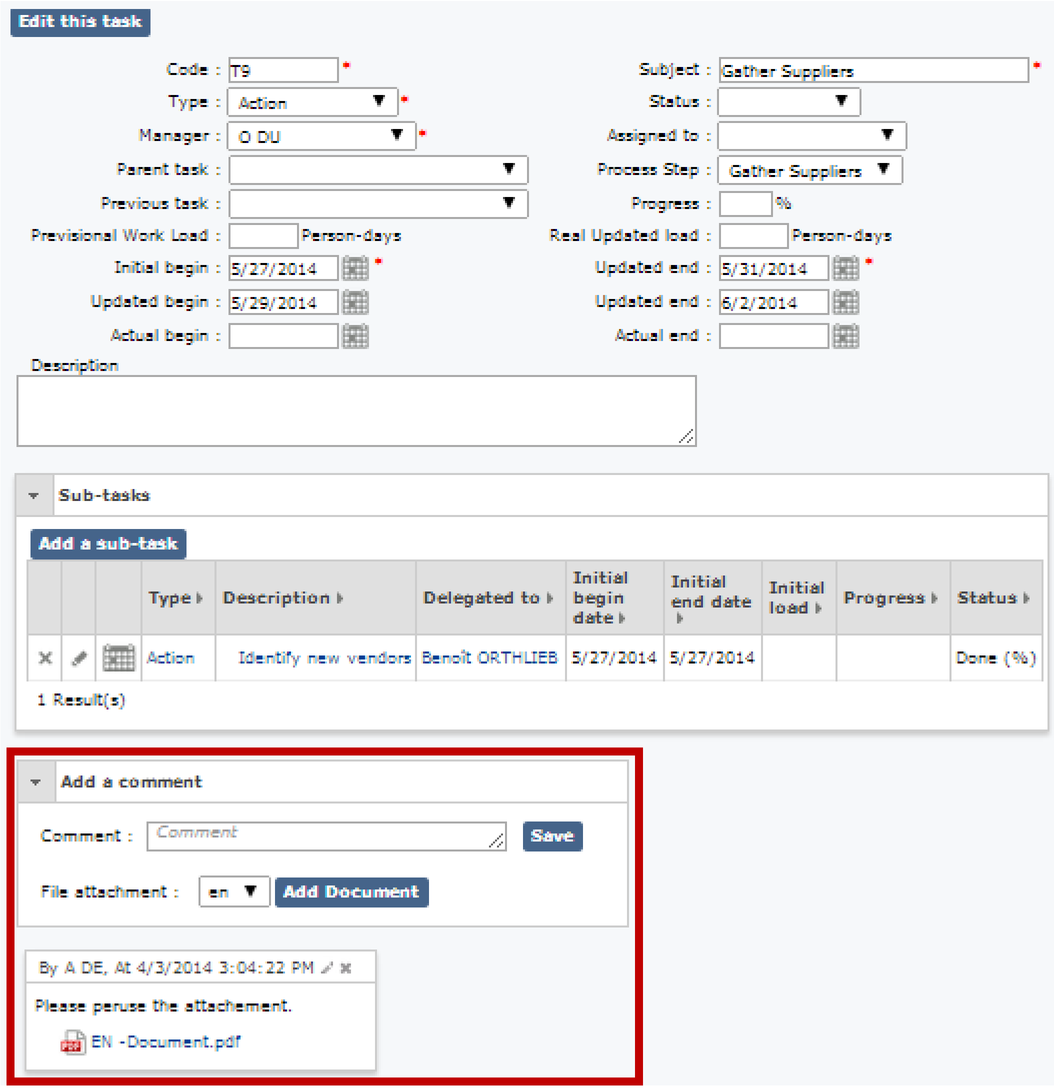
These documents are Knowledge Base documents that have been linked to the step via the document management feature by the Administrator (*Admin / Document Management* menu). They are linked at template level, and not to the Sourcing Project itself, meaning that a document linked to a step will display in that step, regardless of the Sourcing Project you're looking at.



Inserting Comments or Attachments

The *Add a comment* is displayed like a blog, with a section for text entry (*Comments* tab) and another for attaching files (click **Add document** to locate and attach files). Click **Save** to post your comments and files.

Existing comments can be edited (✎) or deleted (✖) by the commenter.



Status of SourcingProjects' steps

The status of steps helps you better visualize the progress of a Sourcing Project.

Step status is materialized by a color code:

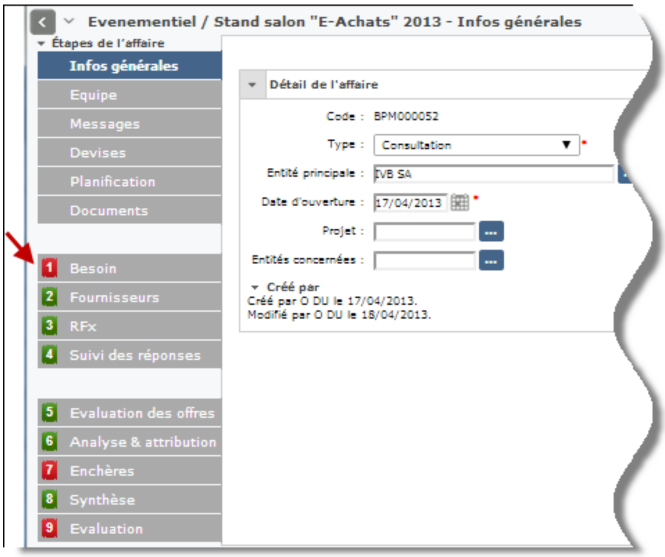
Done

In progress

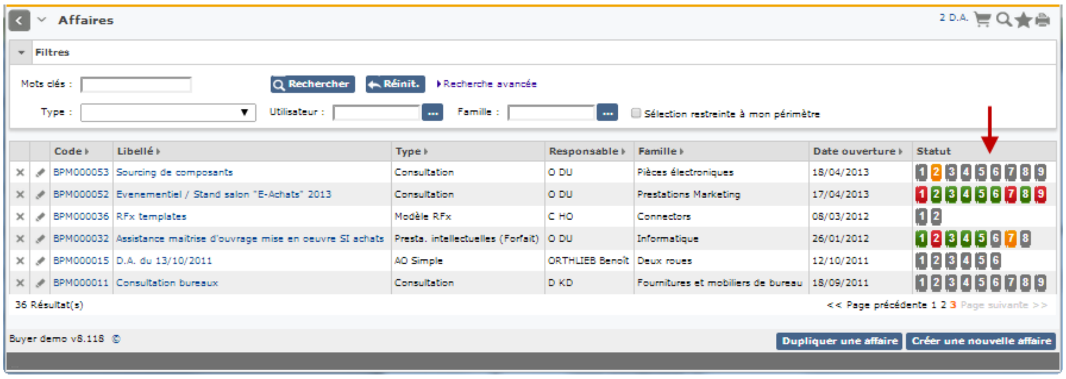
Not started

It is used:

- In the Sourcing Project



- In the list of Sourcing Projects



If you hover over a step icon, the name of the step is shown. Clicking on it will take you directly to that step inside the sourcing project.

The status of a step is determined by the status of the tasks that relate to it:

- If all the tasks linked to a step have a *Done* status, then the step's status will move to *Done* (green)
- If at least one of the tasks has the status *In progress* or *Done*, then the step will change to *In progress* (orange)
- In all other cases, the step has no status (gray)

Workflows Attached to Sourcing Projects' Steps

Depending on the requirements of each company, it is possible to associate a specific workflow with each Sourcing Project's step (configuration) and to have the workflow vary based on the project's main organization.

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Creating a Sourcing Project

Overview

Depending on the context, you may:

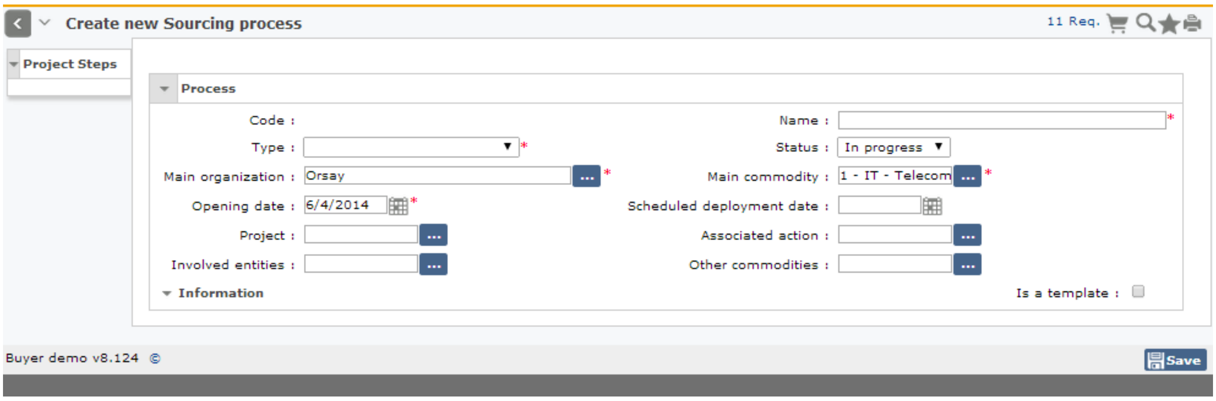
- Create a blank project
- Create a new project by copying an existing project
- Create a sourcing project from a selection of catalog items
- Create a new sourcing project from a purchase requisition

Creating a Blank Project

1. Select the menu *Sourcing / Create Sourcing project*

   Alternative: Go to the *Browse Sourcing Projects* page and click on the button **Create a New Sourcing Project**

   A new Sourcing Project creation form is shown:



   Your organization is automatically entered according to your default organization.

2. Enter the fields as necessary. Mandatory fields are:
   - Project *Name*
   - Project *Type*
   - *Main commodity* which is the commodity family of this Sourcing Project
   - *Main organization* (if not already automatically entered)
   - *Opening date* (defaulting to the current date)

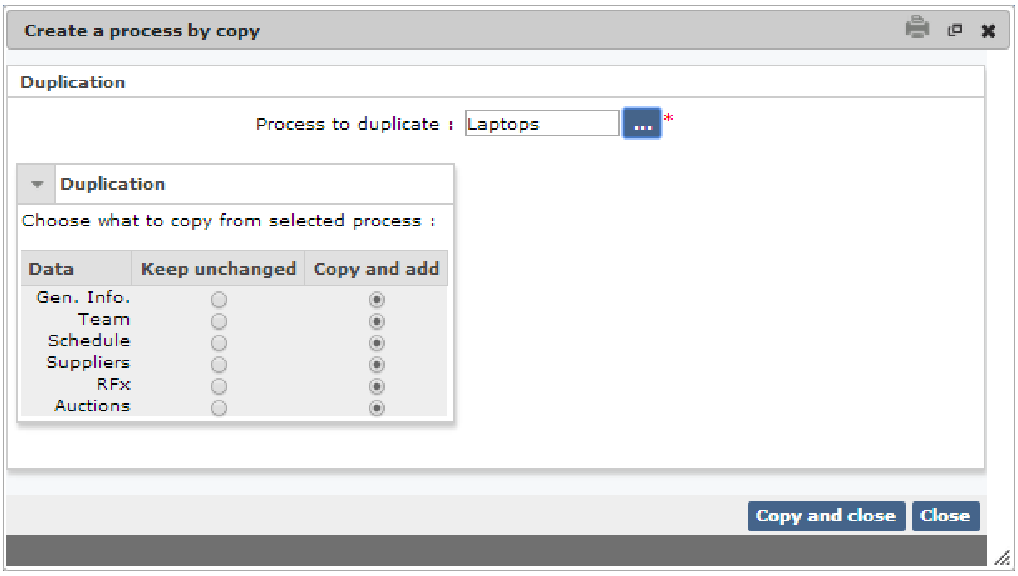
   Note: The **scope** (defined by the commodity and organization) defines the access rights of different users who may refer to this Sourcing Project. The scope also defaults into searches later in the process (for possible suppliers or documents, for example).

3. Click on the **Save** button and the Sourcing Project is now *in Progress.*

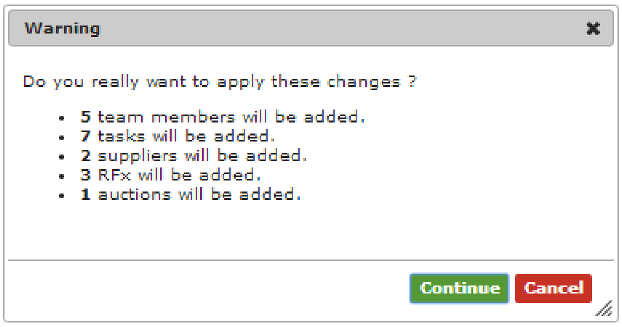
Creating a New Sourcing Project by Copying a Previous Project

1. Access the *Sourcing / Browse Sourcing Projects* menu.
2. On the Browse screen, click on the **Duplicate a project** button on the action bar at the bottom of the screen.
   The *Create a Process by copy* window pops up:

3. In the *Process to duplicate* field, type few letters of the Project name of the Sourcing Project you wish to copy. Alternatively, click on the Selector button ... to perform a more detailed search for the Sourcing Project you wish to copy.
   Once selected, a *Duplication* area is shown which allows you to pick the specific areas of the Sourcing Project to copy.



4. For each area, choose whether you wish to *Copy and add* to your new project or to not copy (*Keep unchanged*)
5. Click the **Copy and close** button
   A summary of the elements to be copied is displayed for your final approval:



6. Click **Continue** to confirm.

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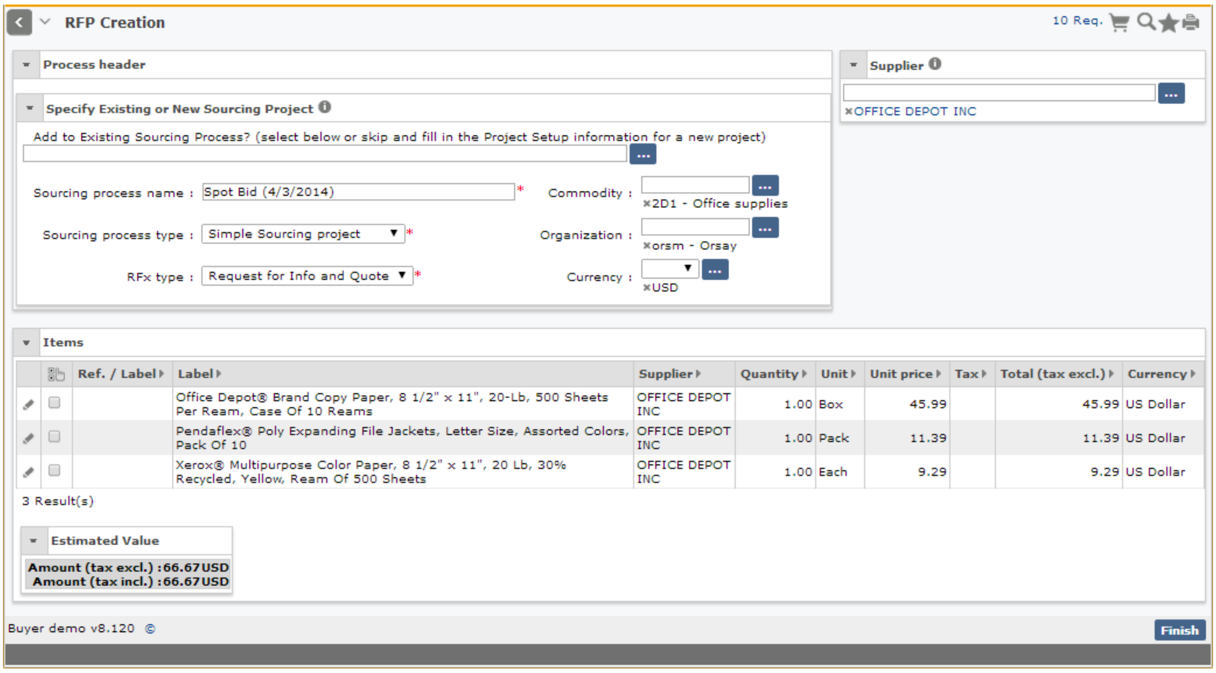
Creating a New Sourcing Project (RFP) From a Selection of Catalog Items or From a Purchase Requisition

Accessing Sourcing Project Creation From the Catalog

This feature allows renegotiating the price of a selection of catalog items by creating a request for proposal directly from the catalog.

1. Access the IVALUA catalog.
2. Locate the items you wish to include in the RFx and select their checkbox. You can also specify the quantities to be sourced so that they can be reflected in the *Items* tab of the RFx. In like manner, tiered-pricing schemes will be taken into account for setting item reference prices of RFx items (if the quotation grid includes a reference price).
3. Click the button **Other actions > Spot Bid Selected Items**.

   The *RFP Creation* page will display.



Items to be sourced can be added to a new Sourcing Project or to an existing one.

Accessing Sourcing Project Creation From a Purchase Requisition

This feature allows creating an RFx directly from a purchase requisition in order to put a price on non-catalog items or to obtain a better price than the one currently praticed, for instance.

To do so: In your purchase requisition, click the button **Other actions > Spot Bid**. The *RFP Creation* page will display.

Adding the Selected Items to a New Sourcing Project

1. Select the type of sourcing process and the type of RFx you want to create.
2. Give a name to the new sourcing process.
3. Select the organizations involved (*Organization*).
4. By default, commodities, currencies and suppliers that will be invited to bid are pre-selected based on item data found in the catalog. You can modify this data as needed (add or delete suppliers or currencies, for instance); you will be able to modify later on as well.

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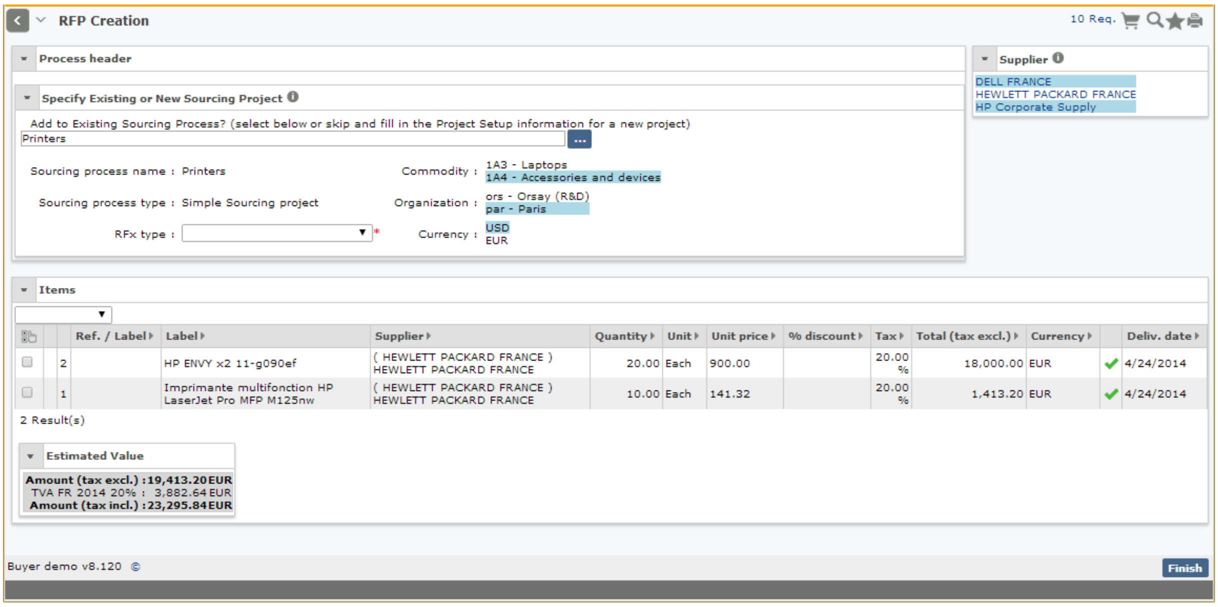
5. In the list of items, select the items you want to include in the Sourcing Project. Click to select them all.
6. Click the **Finish** button to create Sourcing Project.

   The Sourcing Project will display.

Adding the Selected Items to an Existing Sourcing Project

1. In the field *Add to Existing Sourcing Process?*, select the Sourcing Process you want to add the items to (Sourcing Processes are filtered on the type that is currently selected in the field *Sourcing process type*; you should select the type of the target Sourcing Process, or else you should deselect the preselected default type and leave the field empty in order to access all Sourcing Process types).



Once the Sourcing Project is selected, its attributes (commodities, organizations, currencies, suppliers) are added to those already selected.

Note:	In order to remove these attributes, you will have to delete the Sourcing Project selected in the field *Add to Existing Sourcing Process?*.

2. In the list of items, select the items you want to include in the Sourcing Project. Click to select them all.
3. Click the **Finish** button to update the selected Sourcing Project. The Sourcing Project will display.

Completing the Creation of the Sourcing Project

1. Specify the *Opening date*.
2. Click the **Save** button.

   The Sourcing Project has an *In Progress* status.

   The *Prepare RFP* step is pre-filled with the following data:

   - The type of RFx, as selected when creating the Sourcing Project
   - Items to be sourced (the item type is automatically set to the default type, that is *Required item*)
   - The reference price of items is pre-filled with the price listed in the purchase requisition or the catalog.
   - Comments linked to PR items are copied in the description of RFx items.

   When items are added to an existing Sourcing Project, the main commodity set for that Sourcing Project will be maintained even if the items you are adding belong to a different commodity. In the RFx, items are added as a new lot.

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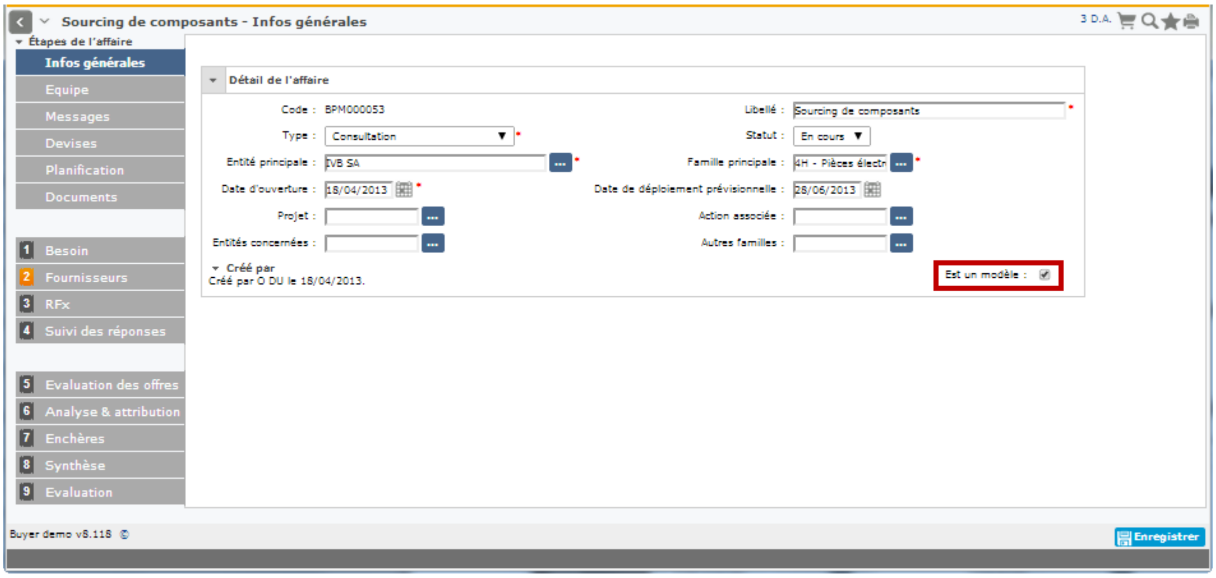
Management of Template Sourcing Projects

Defining a Sourcing Project as a Template

1. Open the Sourcing Project and display the *Set up Project* step (*Requirements Gathering* step if it's a *Service Purchase* type of project).
2. Select the checkbox *Is a template*.
3. Click the **Save** button.



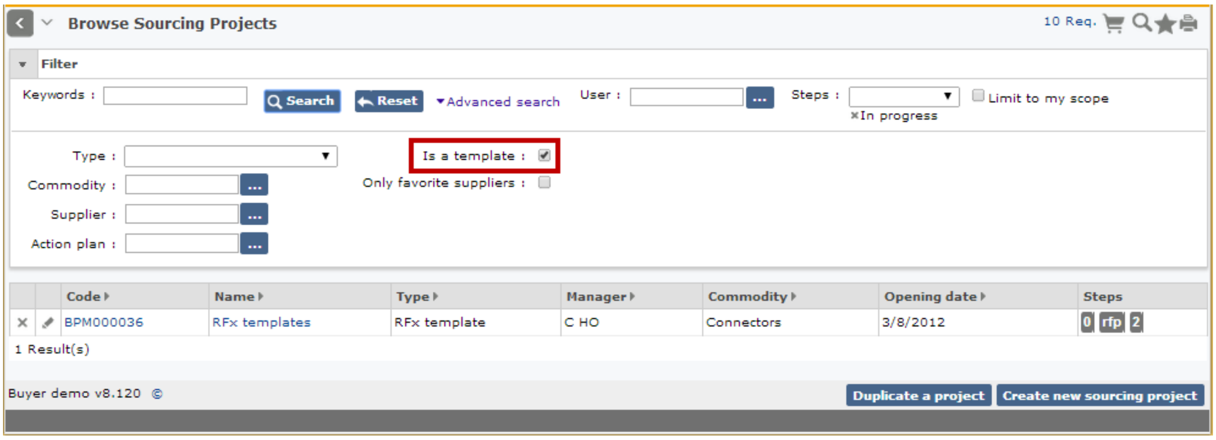
Searching for Template Sourcing Projects

To display templates in the Sourcing Projects search screen, activate the filter *Is a template*.

Creating a Sourcing Project by Duplicating a Template

The duplication feature will let you copy the data from any Sourcing Project (be it a template or not).

However, when duplicating, you have the ability to filter Sourcing Projects to display only templates.



Then select the template you want to copy, and proceed as you would for a regular duplication (see *Creating a new sourcing project by copying a previous project*, page 22).

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Closing and Deleting a Sourcing Project

Closing a Sourcing Project

1. Open the Project's Folder and display the step *General Information.*
2. In the list *Status*, select c*lose*.
3. Click on **Save**.
   The project status displays *Closed*.

Re-opening a Sourcing Project

Access to the Re-open function is restricted to authorized users.

In the Project with status *closed*, a button labelled **Re-open** allows you to open your project.

Deleting a Sourcing Project

Access to the Delete function is restricted to authorized users.

1. From the list of Sourcing Projects, click the *Delete* icon ✖ of the project to delete.
2. If the project contains open lots and rounds of RFx, a message will display with a list of those lots/rounds which will be closed.
   Click **OK** to close those lots/rounds and delete the project.

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RFx PREPARATION & LAUNCH

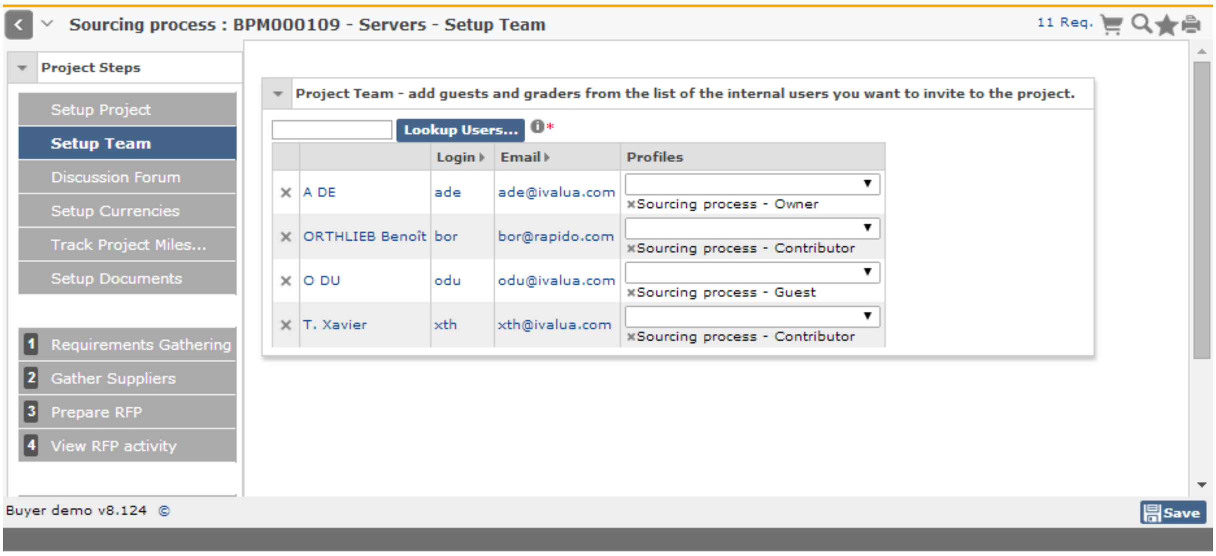
SET UP PROJECT Step

The data for this step was entered when creating the Sourcing Project (see to p.21).

SET UP TEAM Step

Defining the Team for a Sourcing Project

1. In the Sourcing Project, display the *Team* step. This step presents the list of the team members working on the project. The project creator is automatically added as the *Owner*.



2. To declare a new team member, you can:
   - Use the auto completion function in the input field: Type in the first letters of the user name to be added. The application will automatically filter through the list of names from its database and display the ones that match the entry. As soon as the name you are searching for appears in the list, select it.
   - Select one or more users directly from the database: click the **Add a user** button. The list of users will display. Select the users you want to add by clicking their *Select* icon. The names of selected users are added to the team members list.
3. A *Profiles* drop-down list will display: It allows you to assign a role to each team member.
   The following profiles are available:
   - **Owner**. This profile is for the Project lead. His role is to manage the project's information and documents. He also has the ability to add users to the project team.
   - **Contributor**. This profile has write access rights and can manage information on the project
   - **Guest**. This profile has read-only rights and cannot change or delete any information on the project.

   Select the profile you wish to assign to the team member for this Sourcing Project.

   The data will automatically be saved.

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DISCUSSION FORUM Step

Overview

The *Discussion Forum* allows the users collaborating on the Sourcing Project (internal users, as well as supplier contacts) to exchange messages.

This helps you ensure that all invited suppliers have equal access to information and provides a means to track all messages exchanged as part of the sourcing event.

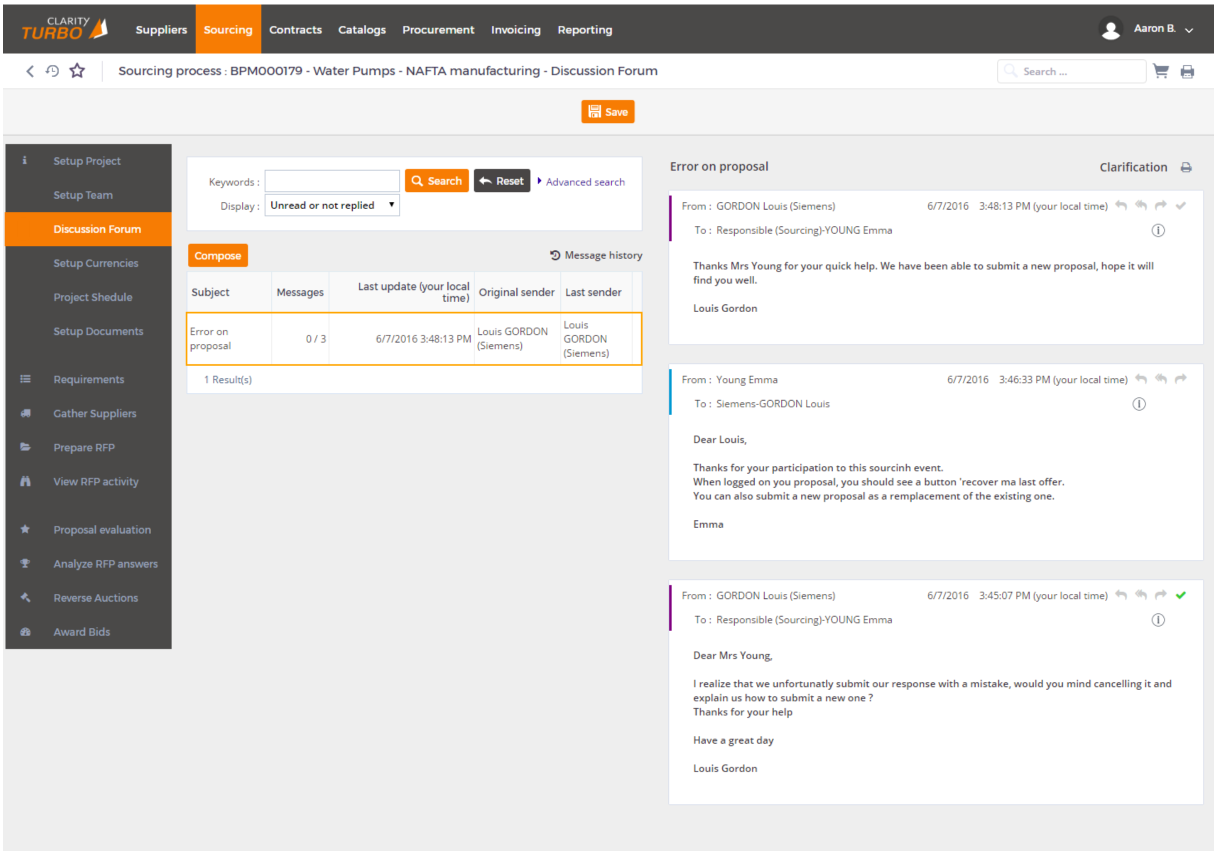
Getting Familiar With the User Interface

Conversation View

Messages are presented in Conversation View, meaning that messages are grouped by subject, and replies to a message are displayed with the original message, forming conversations.

The window is divided into two main parts:

- On the left, the conversation list and related search filters
- On the right, the messages that belong to the selected conversation



The conversation list includes all messages exchanged, whether sent or received. Note however that the list is filtered by default on unread and unreplied messages, placing the focus on messages that are most likely to require attention or action on your part.

Nonetheless, you retain the ability to shift the focus by changing the *Display* filter: you can elect to view unread messages only, unreplied messages only, or all messages. When viewing all messages, the list includes messages that have been read and replied to, as well as sent messages.

On the right-hand side of the window, a color code helps you distinguish at a glance which messages come from suppliers and which come from internal users.

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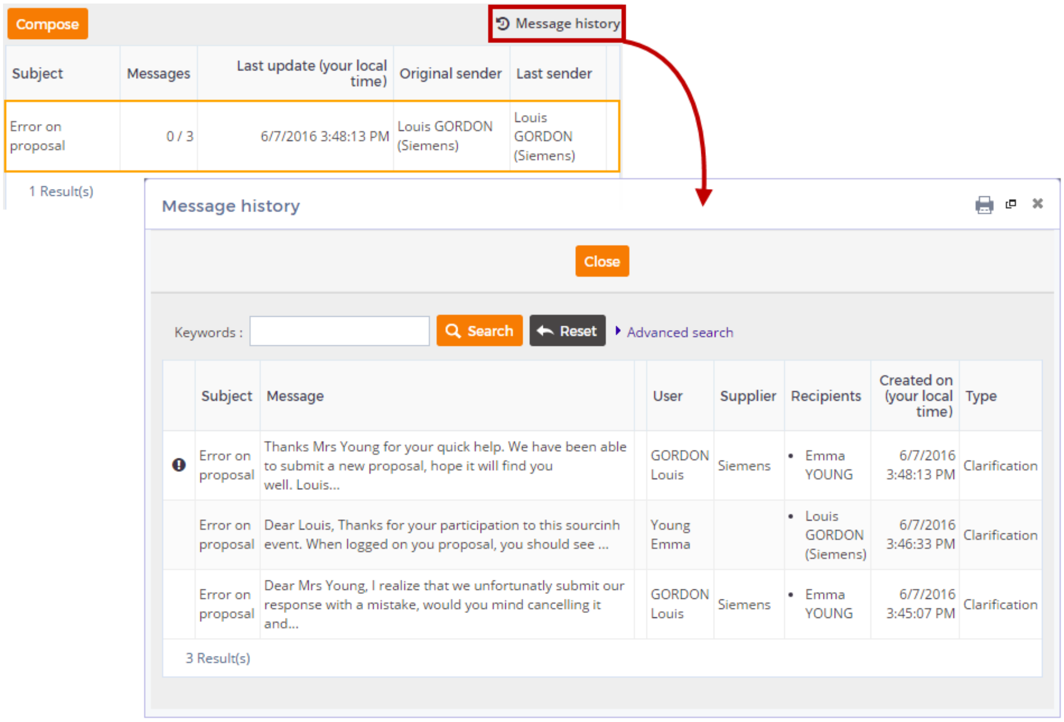
Message History

In addition to Conversation view, you can access a “Message History” window. It shows the list of all messages, sorted by default in reverse chronological order.

You can use the many filters provided to narrow down on a particular subset of the messages.

Column headers give you access to a number of functions: by left-clicking on them, you can sort the results to your liking, while a right-click enables you to tweak the display by hiding columns, or to download the results list in MS Excel format.



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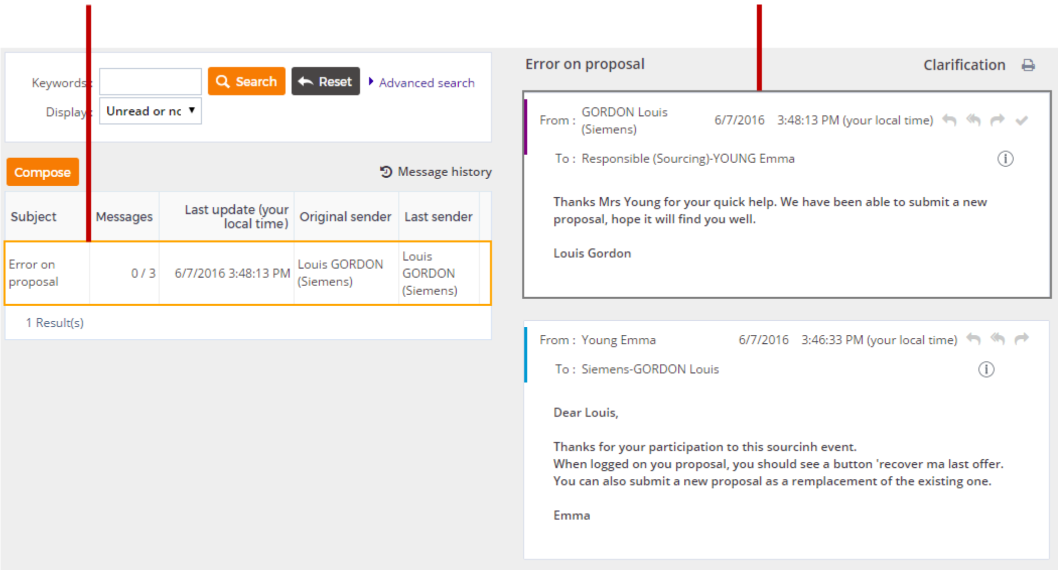
Receiving and Viewing Messages

Notification

Whenever you receive a message as part of a sourcing project, you will receive an email notification. As you click it, the link provided in the notification message will take you to the Forum page with the relevant conversation opened and the new message highlighted.

Relevant conversation is opened

A dark gray frame highlights the new message

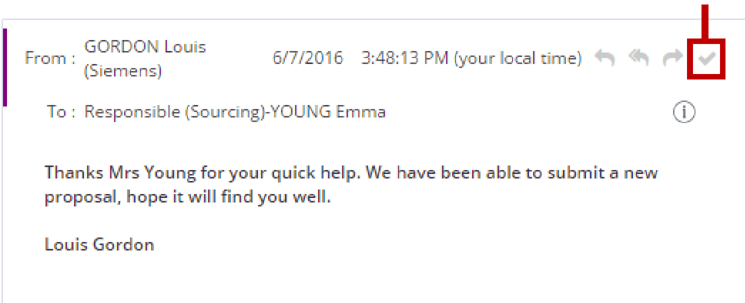


Replied/Unreplied

All newly received supplier messages are flagged as “To be replied”. The status of these messages changes to “Replied” whenever ANY OF THE TEAM MEMBERS does one of two things:

- Replies to the message
- Forces its status to “Replied” (if the message doesn’t call for an answer, for instance)

Mark as replied



In both cases, the new status is updated for all team members. The status can be reverted to “To be replied” any time.

Read/Unread

Unlike the “To be replied” status, the Read/Unread state of the message is managed at recipient level (and not at team level), meaning the message in your mail list will be flagged as “Read” when you open it, regardless of what other recipient team members do.

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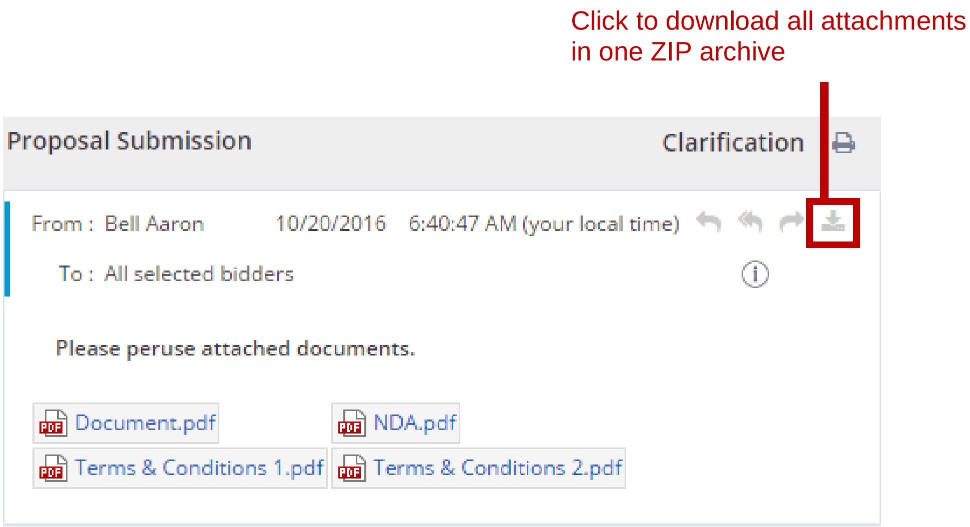
Attachments

Attachments are listed under the message body. You can view an attached file by clicking on it.

In messages that include multiple attachments, you can download all attachments in one go by clicking the *Download all attachments* icon.



Searching and Sorting

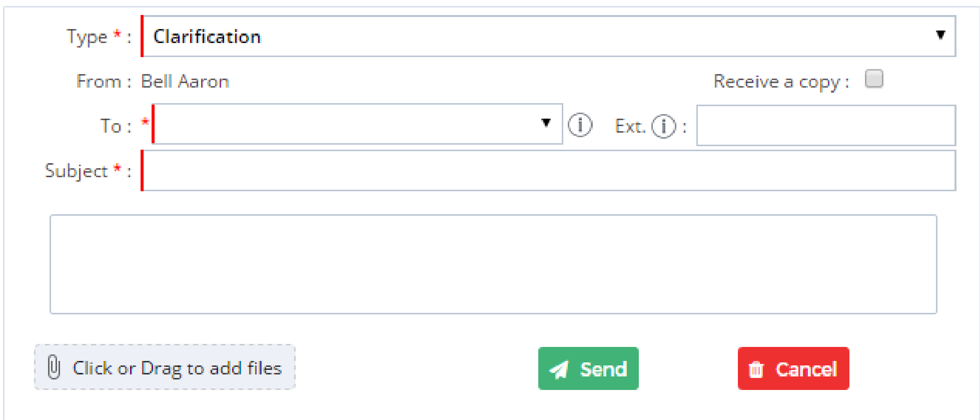
The *Keywords* search field allows you to search the messages' subject and body. Other search filters allow you to search by date, user, supplier, and message type.

By default, the mail list is sorted in reverse chronological order (that is, the most recent message is listed first). You also have the ability to sort the mail list using column headers.

Sending messages

Creating a new message

1. Click the **Compose** button. A message input area will display on the right side of the screen.

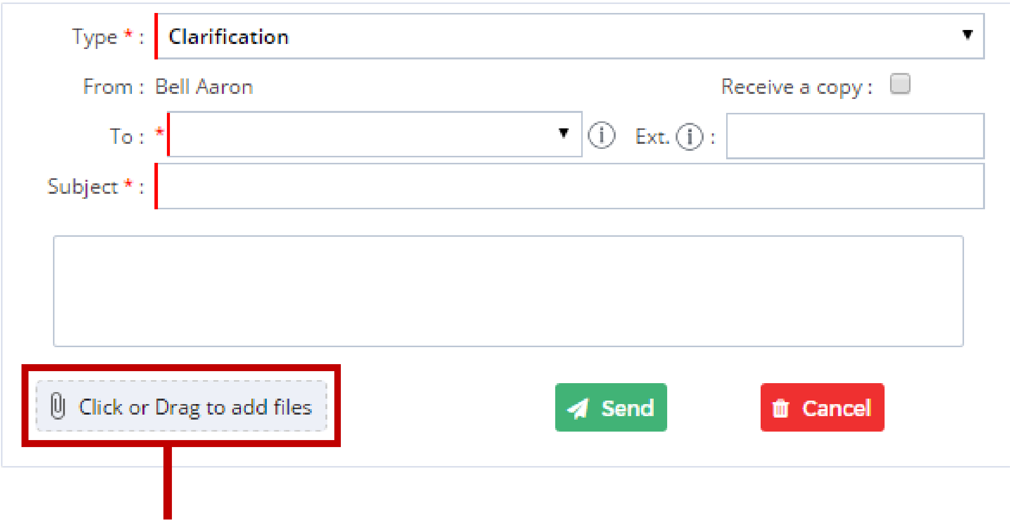


2. Select the type of message you wish to send (by default, the types *Clarification* and *BPM Modification* are available, but the Administrator can add new types and/or delete existing types).
3. Select the message recipient(s).

Selectable recipients are the internal users selected in the *Team* step and the supplier contacts selected in the *Suppliers* step.

You may also CC yourself by selecting the option *Receive a copy*; and/or you may send your message to “external” email addresses (meaning addresses not referenced in IVALUA) by entering these addresses (separated by semi-colons) in the *Ext.* field.

4. Enter the message subject.
5. Enter your message.
6. You can add attachments to your message. To do so, in your file explorer locate the file(s) you want to attach and drag them to the drop zone (gray area).

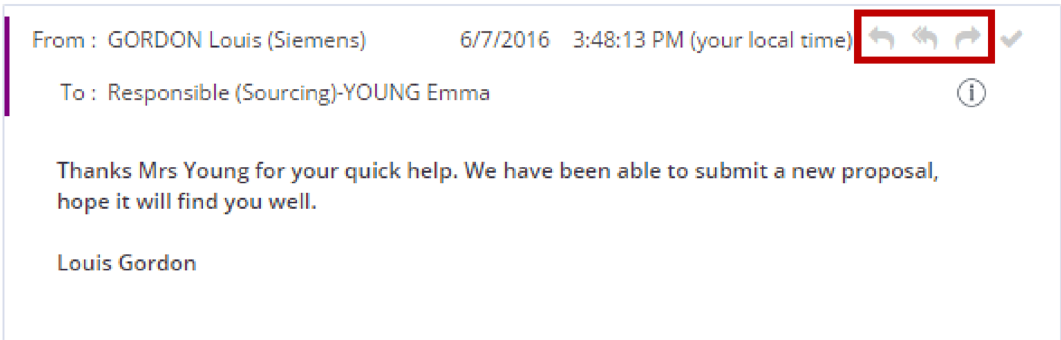


Drop the files you want to send as attachments onto this area

Wait until the upload finishes; you will know the upload is finished when the document is listed below the drop zone, like so:

7. When done, click the **Send** button.

Replying to received messages

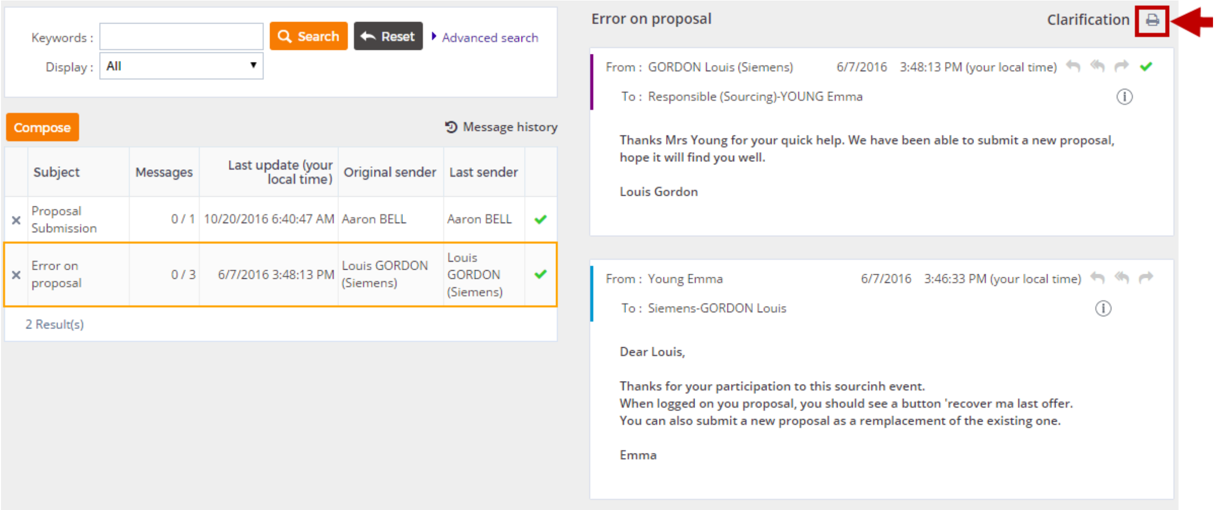


From a received message, you can perform the following actions:

- Reply to the message sender
- Reply to the message sender and to all the recipients as well
- Forward the message

Printing a conversation thread

You can print an entire conversation thread by selecting the desired conversation thread in the mail list on the left, and then clicking the *Print* icon available above the messages, in the right-hand side of the window.



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SET UP CURRENCIES Step

Management of Currencies in Sourcing Projects

The buyer has the ability to choose how currencies will be managed in their project:

- Single currency project: The entire project (including supplier proposals) is expressed in one single currency, the reference currency
- Multi-currency project / Single currency proposals: Each supplier can choose the currency they will use to express their proposal among the bidding currencies selected by the buyer
- Multi-currency project / Multi-currency proposals: Suppliers can quote different proposal items in different currencies (elected among the bidding currencies selected by the buyer)

The currency management mode is defined in various parts of a Sourcing Project:

- In the *Setup Currency* step of the project: The buyer selects the reference currency and the allowed bidding currencies. If the buyer only specifies the reference currency, then it will be a single-currency project.

  ➔See page 36
- In the RFx round: It is the setup of the quotation grid that will determine whether proposals are single- or multi-currency (setting: Is item currency).

  ➔ See page 83
- If it is a multi-currency project, suppliers will choose the currencies to use in their proposals (among the bidding currencies allowed by the buyer).

  ➔ See Supplier Portal Manual
- Once submitted to the buyer, supplier proposals will be converted into the reference currency using the rates defined in the *Setup Currency* step and will be displayed in the *Analyze RFP answers*. A tooltip allows you to view the calculation details.

  ➔ See page 149

Selecting the Reference Currrency and Other Accepted Bidding Currencies

The *Currencies* section lets you specify the reference currency for the Sourcing Project. It also allows you to select one or more bidding currencies: solicited suppliers will be able to bid using any of these currencies.

1. In the Sourcing Project, display the *Setup Currencies* step.
2. Select the reference currency. If it is not listed in the drop-down list, click the *Selector* button ...; in the window that displays, select the desired currency using its *Select* icon.
3. Select one or more bidding currencies; these are the currencies that solicited suppliers may use to express their bids.
   Selected bidding currencies display below the drop-down list; you may delete them using their *Delete* icon ✕.
4. Click the **Save** button. A currency conversion table displays: if you have selected bidding currencies that are different from the reference currency, you should fill in this table.
5. For each bidding currency (other than the reference currency), specify the exchange rate to be applied in the *Exchange rate* column. You can do this in one of 2 ways: The last known exchange rate is displayed in the *Last exchange rate* column: you can copy this rate to the *Exchange rate* column by clicking the icon <<, or else you can enter a new rate.

Last known rate

The last known rate is brought up from the rates maintained by the Administrator in the currency conversion module. When several rates are found for the same currency (different dates or periods), the

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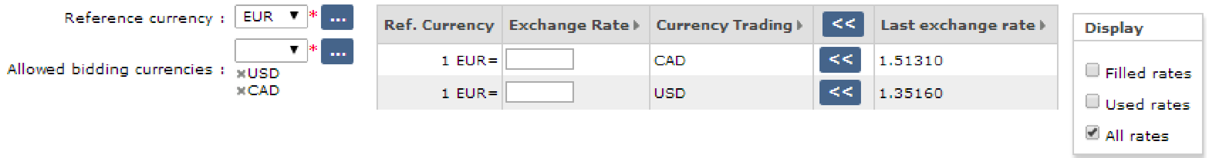
following priority rules are applied:

- The rate with the most recent start date will be displayed first.
- When 2 rates have the same start date, the rate that spans the shortest period gets priority (day > month > quarter > semester > year).



Display options

Once the exchange rates are saved, you have the option to display the currencies according to your preferences:

- *Filled rates*: Only displays the currencies for which an exchange rate has been entered
- *Used rates*: Only displays the currencies used by one or more supplier in their proposals
- *All rates:* Displays all currencies selected as bidding currencies

6. Click the **Save** button.

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PROJECT SCHEDULE Step

Presentation

The *Project Schedule* step helps you create a Gantt chart of your project milestones and organize related tasks.

The Gantt chart can be created very easily based on a template schedule, which you can later tailor to the specific requirements of your project.

Tasks settings allow you to keep tabs on your progress, by tracking initial, updated and actual begin/end dates, as well as percentage complete.

Schedule initialiazation

The way the schedule will be initialized and displayed at the onset of a project can be influenced by configuration. There is a distinction between: the task initialization mode on one hand, and the transfer of task durations from an imported template schedule on the other hand.

Task Initialization

There are 3 task initialization modes (mode is selected during the application's initial configuration stage):

- **Manual**: Creates an empty schedule (no task). You may import tasks from a template schedule or create new tasks (see p. 39).
- **Auto. from a template**: Creates a schedule that is pre-filled with the tasks defined in the selected template Sourcing Project.

  If all the tasks from the template schedule are linked together, you will be able to reschedule all the project milestones by simply typing in a new project onset date.

  You have the ability to edit imported tasks or to create new ones (see p. 39).
- **Auto. from steps**: This mode should be preferred when you don't want to enter and maintain a project schedule (RFx types that do not require a a full-fledged schedule); you will retain the step status information (determined by the status of the main task linked to the step). In the *Project Schedule* step, tasks are auto-generated from the step tasks. They are named after and are automatically linked to the step they originate from. No dates are attached to these steps (only a status).

Transfer of Task Durations From an Imported Template Schedule

Depending on the initial configuration, when tasks are imported from a template schedule, the durations (number of days) assigned to these tasks can be:

- Ignored: tasks are transferred without their durations and you need to input their begin- and end-dates.
- Taken into account: tasks are transferred with their durations; based on these, dates are pre-filled, with the Sourcing Project's opening date (*Setup Project* step) set as the begin date of the first step.

  When the transfer of task durations is enabled, it applies to all template schedule import:

  - ✓ Automatic task creation in **Auto. from a template** mode
  - ✓ Template schedule selection (mostly in **Manual** mode, but becomes available in all task initialization modes when you delete all tasks)
  - ✓ Sourcing Project duplication, regardless of task initialization mode set for the project type

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Creating Tasks

Access Rights to Tasks

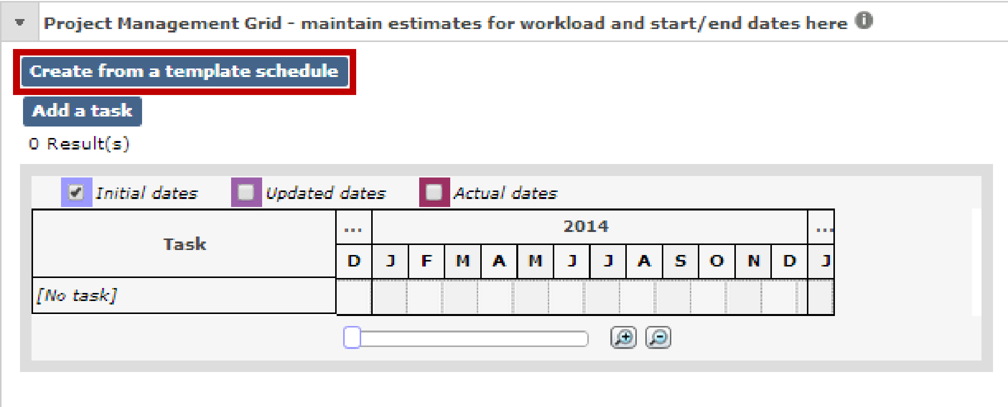
To access a task, a user must meet the following requirements:

- Be the task manager or assignee
- Or else, if the task is linked to a Sourcing Project, have access to the Sourcing Project

Importing Tasks From a Template Schedule

This functionality will mainly be available when the project schedule is initialized in **Manual** mode. It also becomes available in the other initialization modes if you delete all of the tasks.

1. In your Sourcing Project, display the *Project Schedule* step.
2. Click the **Create from a template schedule** button.



A project picker will display in a secondary window: it presents of list of Sourcing Projects with the same type as the current one, created by the connected user, and whose attribute *Is a template* is enabled.

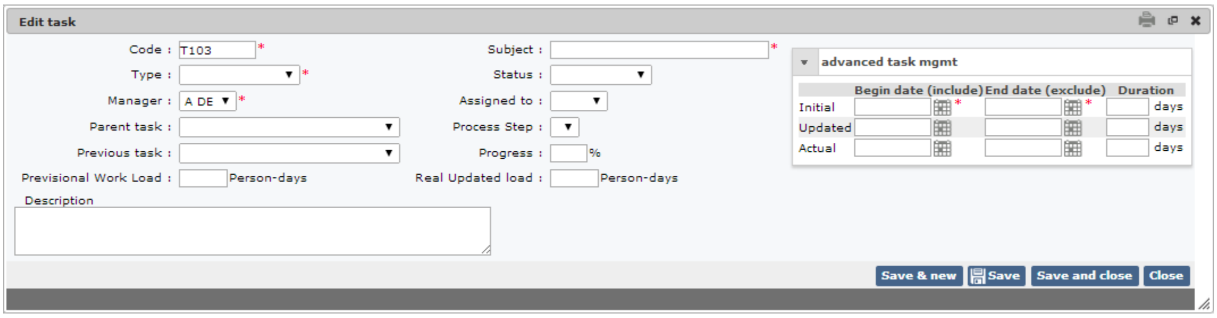
3. Select the Sourcing Project that contains the schedule you want to copy by clicking its selection icon .

You can only use this functionality once: Once the template schedule is selected, the **Create from a template schedule** button is no longer available and the link with the selected template schedule cannot be undone.

Creating a New Task

1. In your Sourcing Project, display the *Project Schedule* step.
2. Click the **Add a task** button.

   The *Edit task* window will display.



3. Fill in the required fields:
   - Give a unique code to the task

- Select a type of task (Action, Event, Phone Contact, etc.)
- Give a name to the task (*Subject*)
- Select task manager and assignee
- Specify the initial begin and end dates
  The task duration is automatically inferred from these dates (by default, the end date is excluded from the calculation; however, this behavior is configurable and the current configuration is clearly indicated by the words “include” or “exclude” displayed to the right of the *End date* label).

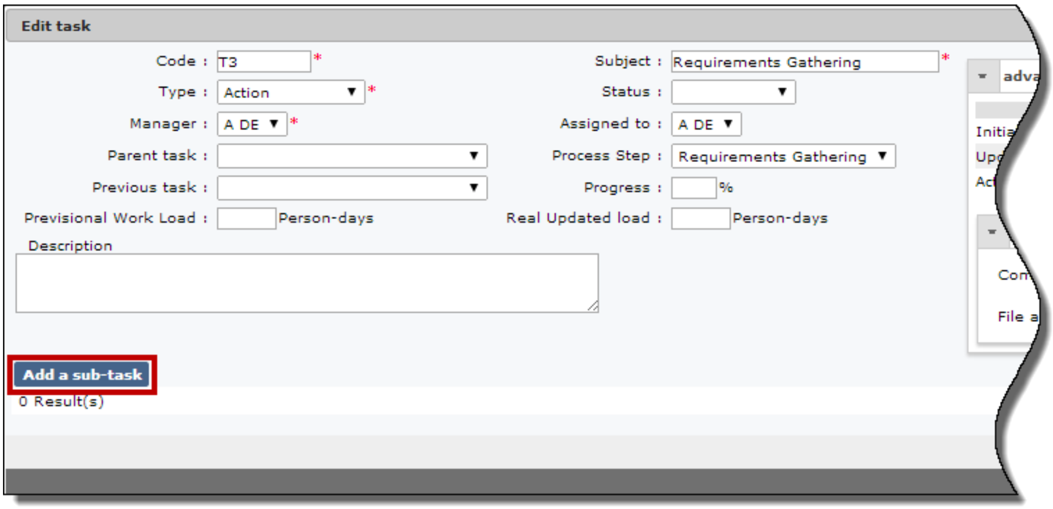
4. Click the **Save** button.
   The new task will display in the Gantt chart.

Inserting a Sub-Task Below an Existing Task

You can create as many task levels as needed. To create a sub-task, you can either create a sub-task below the current task (method 1), or you can create a task and then attach it to a parent task (method 2).

Method 1

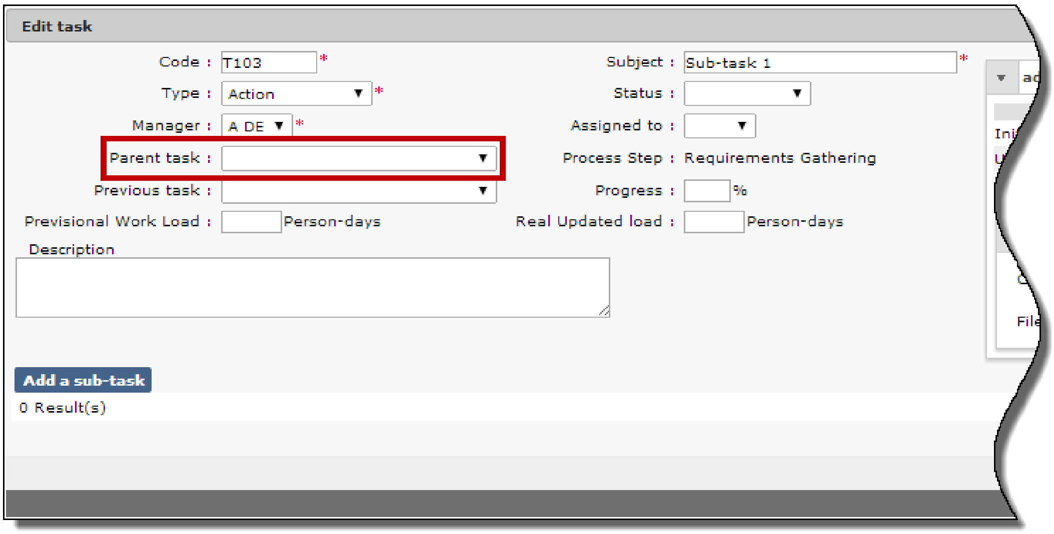
1. Open the task below which you want to insert a sub-task.
   The *Edit task* window will display.
2. Click the button **Add a sub-task**.



A new *Edit task* window will display, for you to set up the new task.

Method 2

1. Create a new task, as instructed on page 39.
2. In the *Parent task* drop-down list, select the task you want to attach the new task to.



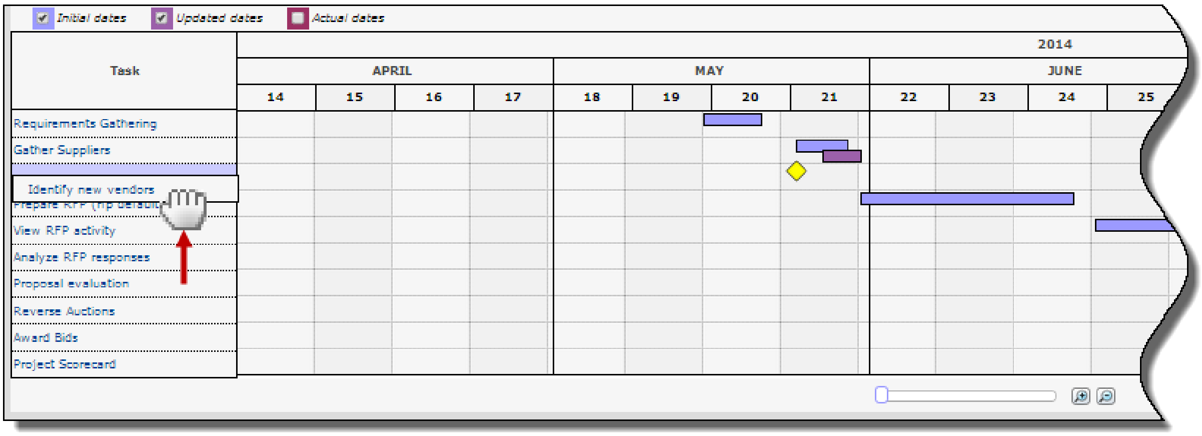
3. Click the **Save** button.

Creating a milestone

To create a milestone, create a task or a sub-task that begins and ends on the same day.

Ordering Tasks in the Gantt Chart

You can reorder task in the Gantt chart to suit your requirements by simply dragging and dropping task labels in the *Task* column.

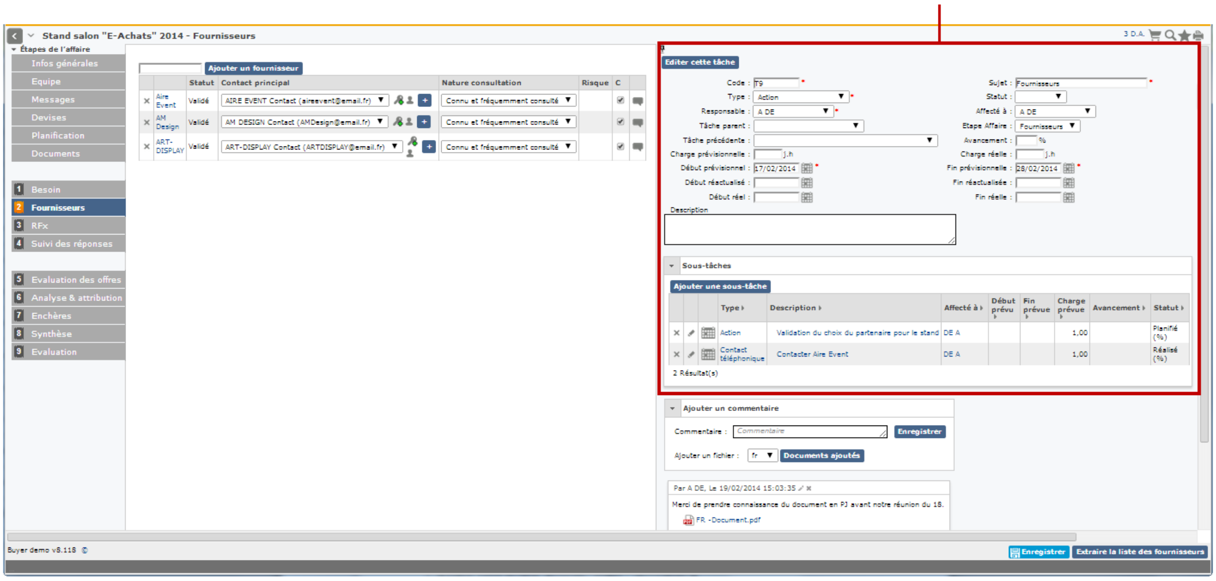


Linking Tasks to the Sourcing Project's Steps

In order to allow project tracking, the schedule must be linked to the various project steps. To achieve this result, you can create tasks that represent the project steps and link these tasks to their corresponding step.

A task that is linked to a project step will be displayed in the step in question (right pane).

Task linked to the current step and its sub-tasks

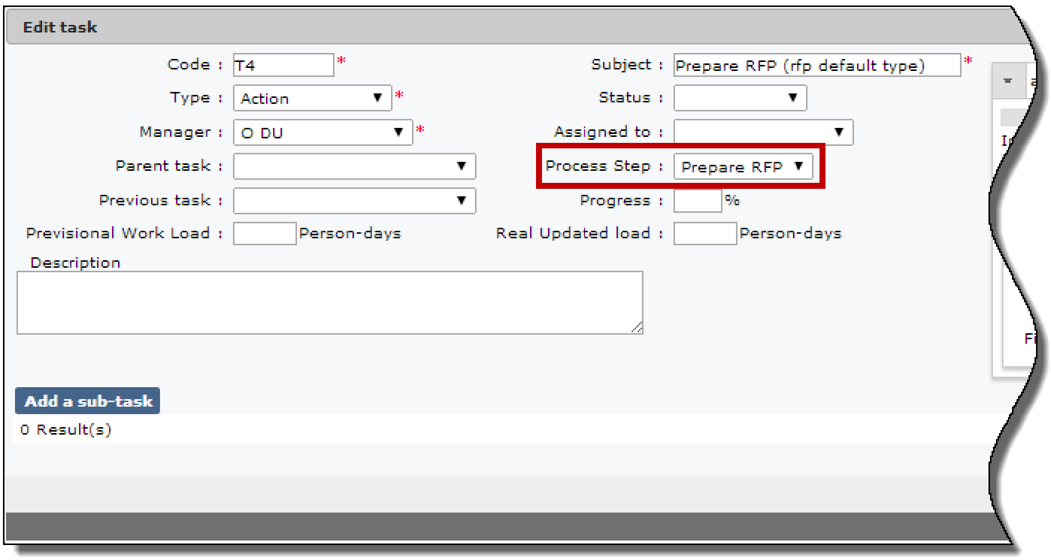


This link between the task and the step is a dynamic one: modifications brought to the tasks or sub-tasks in the project's schedule are mirrored in the linked step, and vice versa.

To link a task to a step:

1. In your Sourcing Project, display the *Project Schedule* step.
2. Open the task you want to link to the desired step.

   The *Edit task* window will display.
3. In the *Process Step* drop-down list, select the step you want to link the step to.



4. Click the **Save and close** button.

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Defining Task Dependencies

Between 2 Sourcing Project tasks, you can define a relationship that determines the order in which these 2 tasks should be performed. These relationships are called "dependencies".

There are 4 types of task dependencies:

- *End->Start* (default): The current task will begin when the other task ends.
- *Start->End*: The current task will end when the other task begins.
- *Start->Start*: The current task and the 'previous' task will begin at the same time.
- *End->End*: The current task and the 'previous' task will end at the same time.

If all the schedule's tasks are linked together, you will be able to reschedule all the project milestones by simply typing in a new begin date for the first task.

To create a dependency:

1. Click the *Edit* icon of the task you want to make dependent on another task. The selected task's details will display in a secondary window.
2. In the *Previous task* drop-down list, select the task that the current task will depend upon.

   Two fields become available: *Link type* and *Delay*.
3. Select the type of link that is appropriate to your situation.
4. If needed, use the *Delay* field to specify the number of days that you want to wait before you transition to the current task.

   For instance, if the link type is *End->Start* and you set a 2-day delay, then the current task will begin 2 days after the linked task has ended.
5. Click the **Save** button.

Tracking a Task's Progress to Completion

1. Click the *Edit* icon of the task you wish to track. The selected task's details will display in a secondary window.
2. The main information on task progress is the percentage complete. Update this percentage according to the current progress of the task.

   The *Status* drop-down list also reflects the completeness of the task (*Scheduled*, *In Progress*, *Done*).

   When the task is completed, you can update the actual end date and workload.
3. Click the **Save and close** button.

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Getting Familiar With the Interface of the Gantt Diagram

Zoom Levels

The zoom icons available below the Gantt chart allow you to change the viewing scale: days, weeks, months and years.

In each of these time scales, you can access 6 zoom levels by maintaining the ALT key pressed while using your mouse scroll wheel.

Horizontal and Vertical Scroll

When the viewing scale does not allow you to view the whole schedule, you can scroll horizontally and vertically to display hidden parts.

- **Horizontal scroll**

  To scroll towards the right or towards the left, use the horizontal scroll bar loacated below the Gantt chart, or else, use your mouse wheel while the cursor is pointing to the chart.

  The scrolling position will be kept while you manipulate the chart (zooming, page turning, task reordering, selecting/deselecting the types of dates displayed).

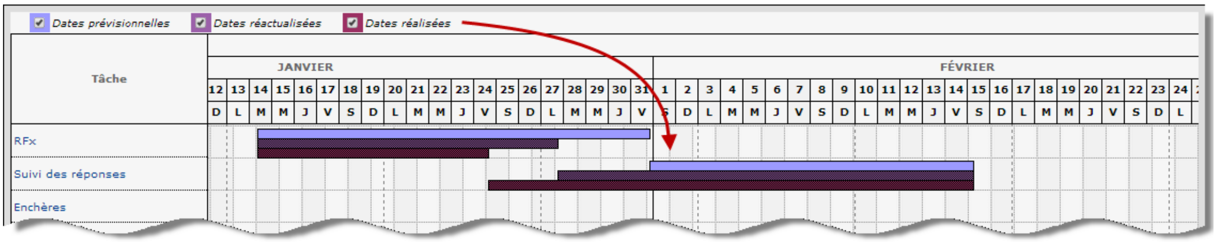
- **Vertical scroll**

  To scroll the chart upward or downward, use your mouse scroll wheel while the cursor is pointing outside the chart, or else, use the vertical scroll bar.

Initial, Updated and Actual Dates

Task settings let you keep track of 3 types of date: initial, updated and actual.

Use the date type selector to choose the date types you want to display in the chart.



The color code assigned to the date type checkboxes shows the color that is used to render each date type in the chart.

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Overall Sourcing Schedule

Principle

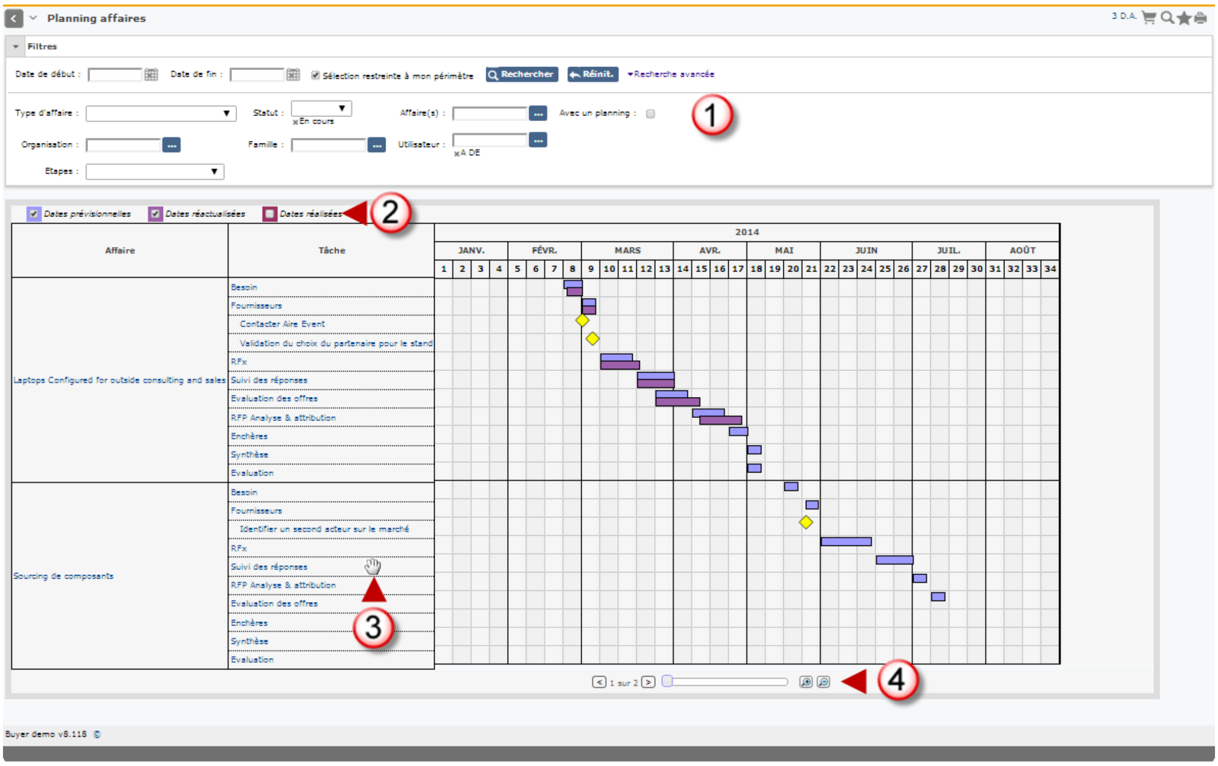
The overall sourcing schedule gives you the ability to view the Gantt chart of a selection of Sourcing Projects that you can display using the search filters

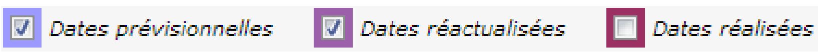
Accessing the Overall Sourcing Schedule

Select the *Sourcing / Sourcing schedule* menu.

Using the Interface

The table below highlights the main points you should know in order to use the sourcing schedule:



1	Search filters area: Use to filter the Sourcing Projects that will be displayed in the Gantt chart	
2	 Date type selector: Select the date types you want to view in the chart (the color code of the checkboxes shows the color that will be used to render each type of date)	
3	 When hovering tasks, the cursor takes on the shape of a hand which allows you to reorder tasks using drag and drop	
4		Turn pages
		Scroll the schedule timeline
		Change the viewing time scale (year, month, week, days)

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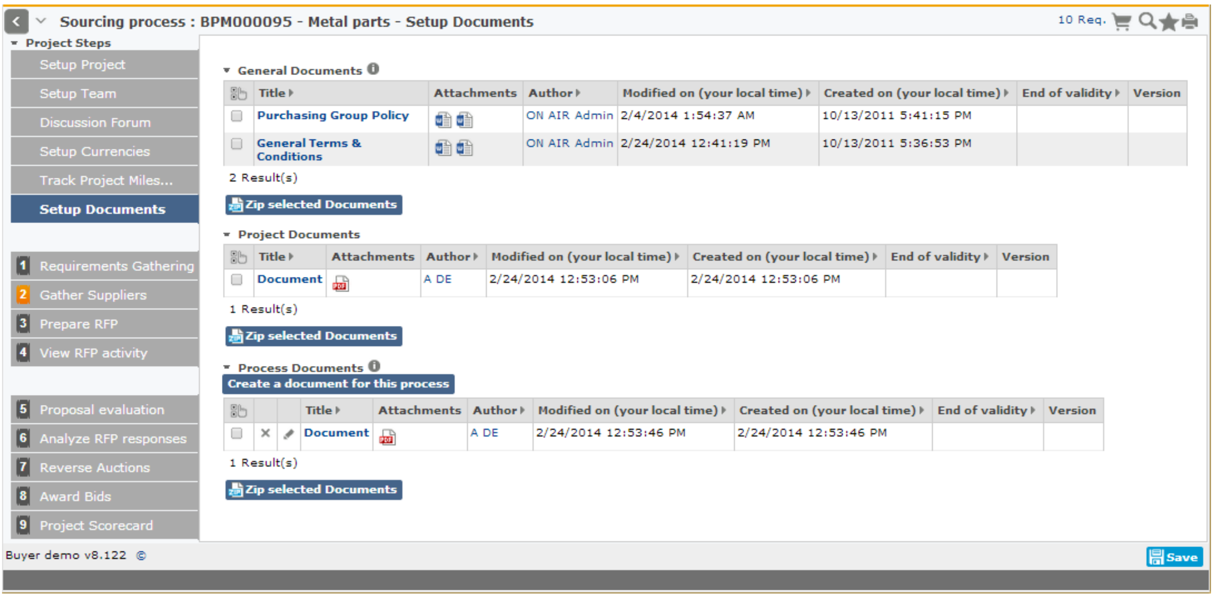
SET UP DOCUMENTS Step

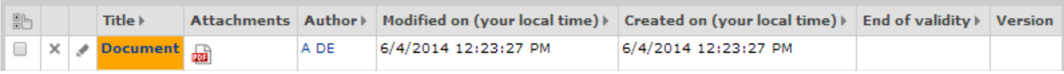
Attaching Documents to a SourcingProject

The *Setup Documents* step gathers different types of documents:

- **General Documents**: contains general documents that can be useful in all Sourcing Projects and are uploaded by the Administrator. This list is generated automatically and is identical in all sourcing projects.
- **Process Documents**: allows you to create and attach materials that are related to the current sourcing process.
- **Project Documents**: lists the documents that are linked to the umbrella project the Sourcing Project is attached to (*Setup Project* step). This list does not display if the Sourcing Project is not tied to any umbrella project.



Caution: Documents in *Draft* status, which are displayed on an orange background, can only be viewed by their author. To make them available to the other users, their author must change their status to Approved/Published.



			Title	Attachments	Author	Modified on (your local time)	Created on (your local time)	End of validity	Version
			Document		A DE	6/4/2014 12:23:27 PM	6/4/2014 12:23:27 PM		

Attaching Documents to a Sourcing Project

1. In your Sourcing Project, display the *Setup Documents* step.
2. Click the button **Create a document for this process**. The *Document process* window will display.
3. Set up the new document:
   - Define a title
   - Select a status
   - Attach a file
4. Click **Save and Close**.

Viewing a Document

Click the title of a document or its attachment icons to open.

Note: There is no limit on the number of documents attached (except for storage limit on the application).

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REQUIREMENTS Step

Overview

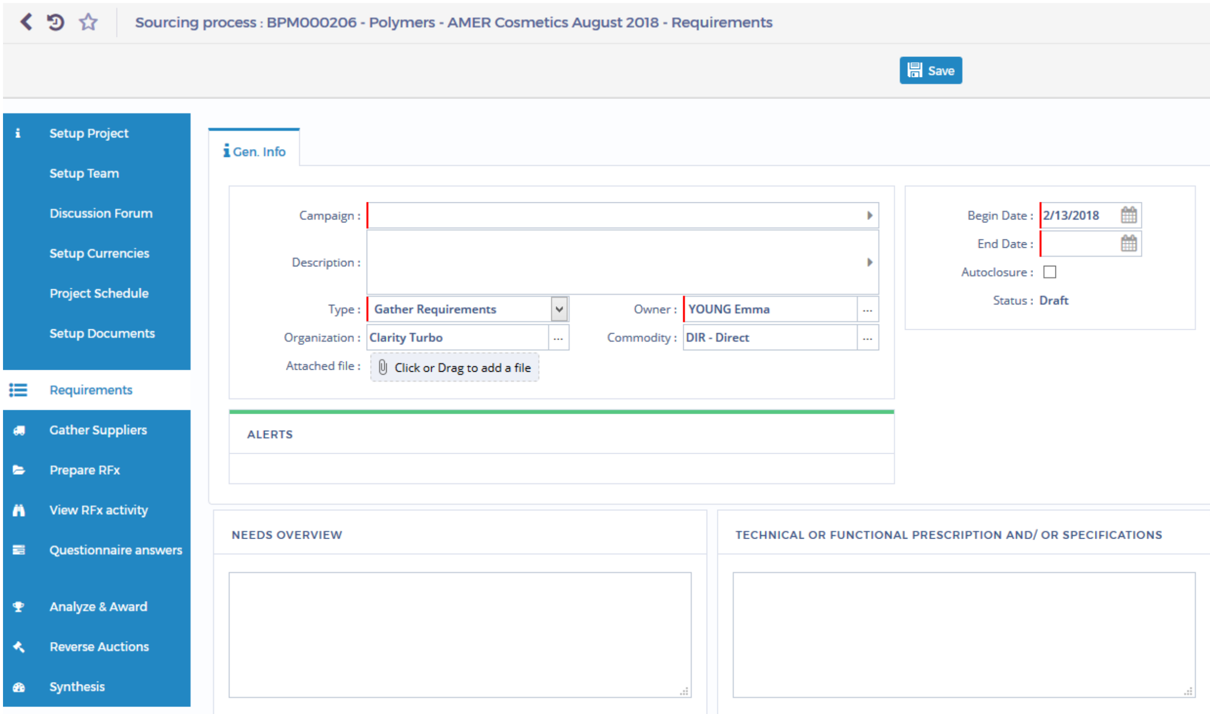
The purpose of this step is to conduct an internal survey, in order to gather accurate and comprehensive information on sourcing requirements. The outcomes of the survey will help you when preparing your RFx.

Conducting a requirements gathering survey involves the following activities:

- Initiating the survey campaign
- Building the questionnaire and selecting the respondents
- Opening the survey for feedback
- Analyzing the survey results

Initiating the Survey

1. Access the *Requirements* step of your sourcing project. A blanc sheet is displayed.



2. Fill out the requested information in the *Gen. Info* tab.
3. Save. The *Questionnaire*, *Evaluations*, *Workflow* and *Comparison* tabs are now displayed, and you can proceed with creating your questionnaire.

Beware that:

- The *Begin date* is displayed for information purposes only. Even if the begin date is reached, you still need to manually open the campaign for answers.
- The *Autoclosure* option defines the campaign closing mode (automatic or manual). If this checkbox is selected, the campaign will end automatically once the campaign end date is reached. Otherwise, it remains open even when the end date passes, and the campaign manager must close it manually.

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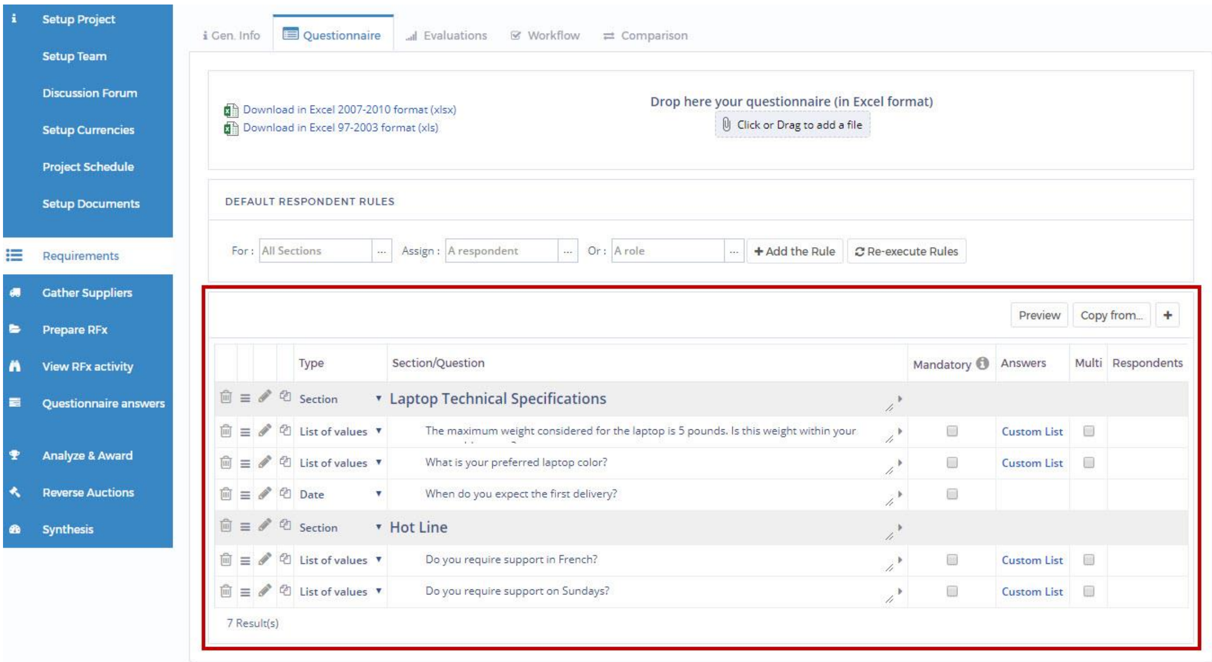
Building the Questionnaire Form

Overview

The survey questionnaire is set up in the **Questionnaire** tab. It can be broken down into sections and sub-sections, if needed.



You can create your questionnaire form in one of two ways:

- Using the IVALUA web UI
- Using a Microsoft Excel® file

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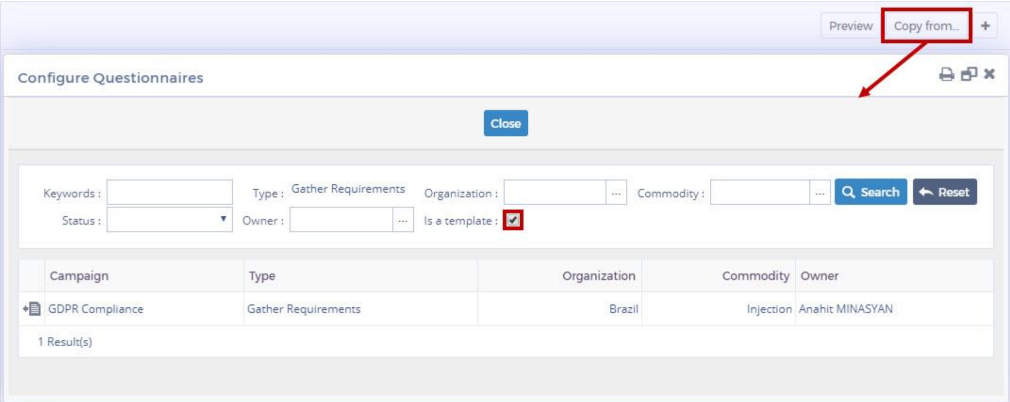
Editing the Questionnaire Form Using the IVALUA Web UI

Copying an Existing Questionnaire

You can re-use existing questionnaires. Existing questionnaires can either be questionnaires created in other survey campaigns or templates configured by authorized users.

1. Click the **Copy from** button in the *Questionnaire* tab.
   The pop-up window displays the available templates. To display the questionnaires created in other survey campaigns, deselect the **Is a template** filter.

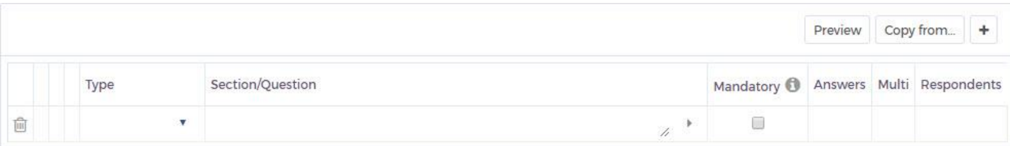


2. Select the desired questionnaire. The questions are added to your campaign.

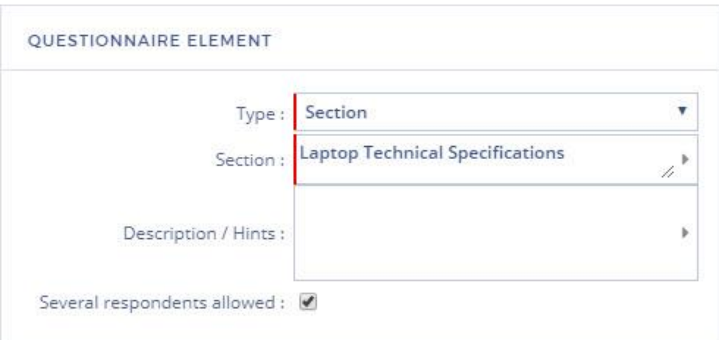
You can complete your questionnaire by adding new sections and questions specific to the current survey.

Adding Sections & Sub-sections

1. Click the **Plus Sign** icon in the *Questionnaire* tab. A new row is added to the question grid.



2. Select whether you want to create a section or sub-section using the **Type** field.
3. Enter the section/sub-section title in the **Section/Question** column.
4. Click the **Save** button in the action bar.
5. Set up additional settings. To do so, click the *Edit* icon next to the desired section or sub-section. The settings window opens.



- To add clarification or guidance instructions on how to answer the questions, use the *Description/Hints* field.
- To allow assigning more than one respondent to the current section, select the *Several respondents allowed* option.

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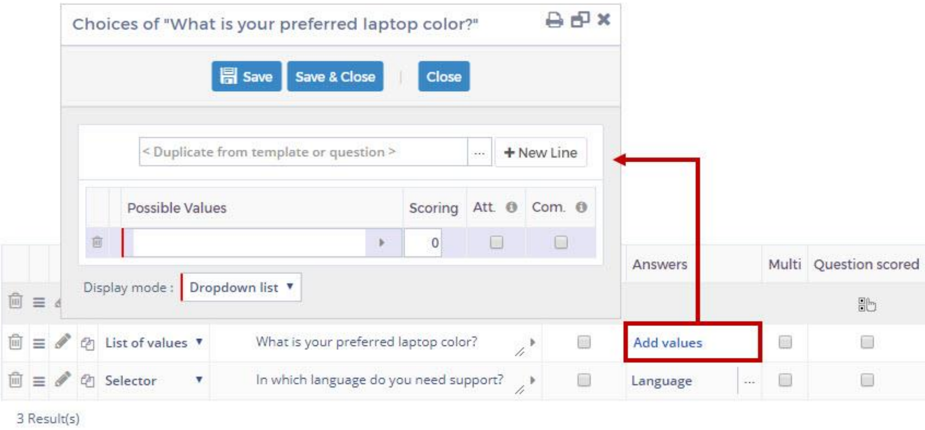
Adding Questions

1. Click the **Plus Sign** icon + .
2. Select the question format using the *Type* column.
3. Fill out the question statement in the *Section/Question* column.
4. To indicate that respondents are required to answer the question, select the *Mandatory* checkbox.
5. Save. More settings become available for selector and multiple-choice questions (List of values), namely the *Answers* and *Multi* columns.

6. To allow more than one answer, select the *Multi* checkbox.
7. To setup the list of answer options, use the *Answers* column:
   - For a selector question type, choose the selector to be displayed in the questionnaire form.
   - For a multiple-choice question, click **Add values** to access a screen that will allow you to create a choice list for possible answers.



To create your answer choice list, you can either:

✓ Select an existing list from the choice list selector (labeled *Duplicate from template or question*): this selector allows you to copy a choice list from another question in the current questionnaire or from a template, or

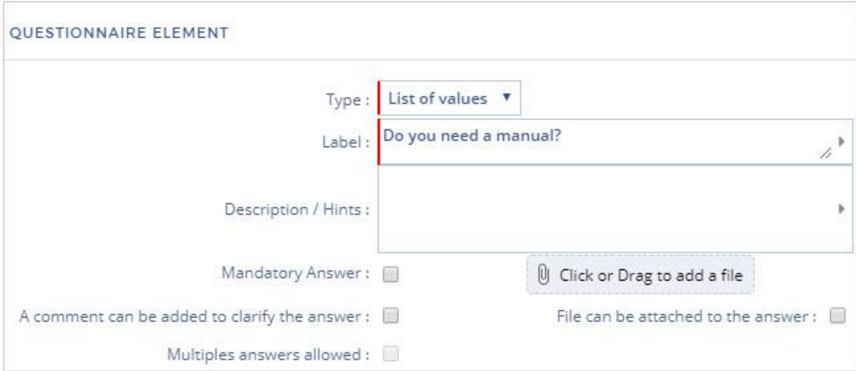
✓ Enter each answer choice in the *Possible Values* column (using the **New line** button to add new rows).

To define whether an attachment or a comment is required for an answer choice, use the *Att.* or *Com*. checkboxes.

To indicate how you want possible answers to be displayed, use the *Display Mode* drop-down list.

Save & close.

8. Set up additional settings. To do so, in the questionnaire grid, click the *Edit* icon next to the desired question. The settings pop-up window opens:



- Use the *Description/Hints* field to add a comment to your question.
- Use the file upload area if you wish to supplement your question statement with additional information in a separate file. The attached file will be available to respondents.
- Select the *A comment can be added to clarify the answer* or the *File can be attached to the answer* option if you wish to allow respondents to add a comment or a file to their answer.

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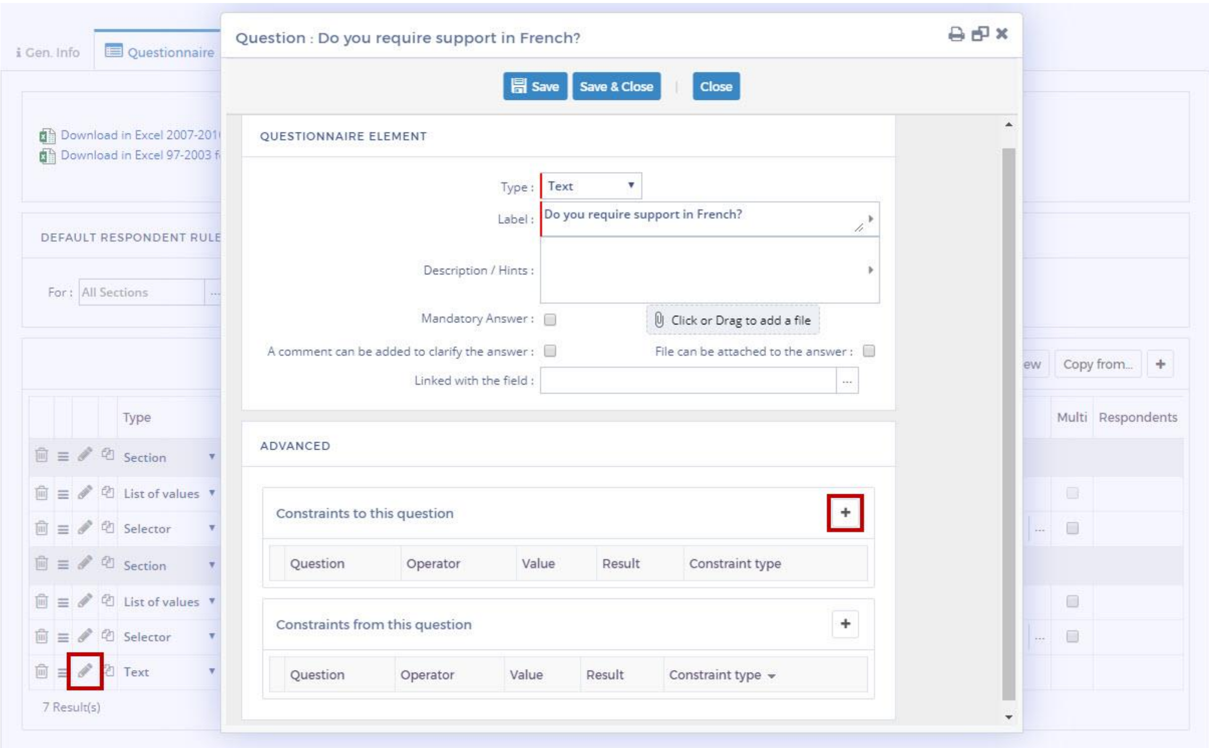
Setting up Conditional Behaviors for Questions

Information Collection questionnaires allow you to set up conditional behaviors based on respondent's answers.

Conditional behaviors always involve two questions: **the question whose response is being evaluated** and **the question that will be affected** if the condition is met.

You can set up the desired conditional behavior from either of the two questions involved. To do so, open the desired question settings by clicking the *Edit* icon, go to the *Advanced* section and click the **Plus Sign** icon + in *Constraints to this question* or *Constraints from this question* section:

- **Constraint TO this question:** The current question is the affected question, in other words, the question that will show the result of the condition being met.
- **Constraint FROM this question:** The current question is the question whose response will be evaluated to induce a result.



Possible conditional behaviors (*Constraint type*) include the ability to skip or display questions and the ability to set a question, a comment, or a file attachment as required, all based on respondents' answers.

Let's illustrate this with a simple example. Let's imagine you want to ask your internal users whether they need a manual and, if so, what are the desired language versions:

- Q6 – Do you need a manual?
- Q7 – Select the desired languages.

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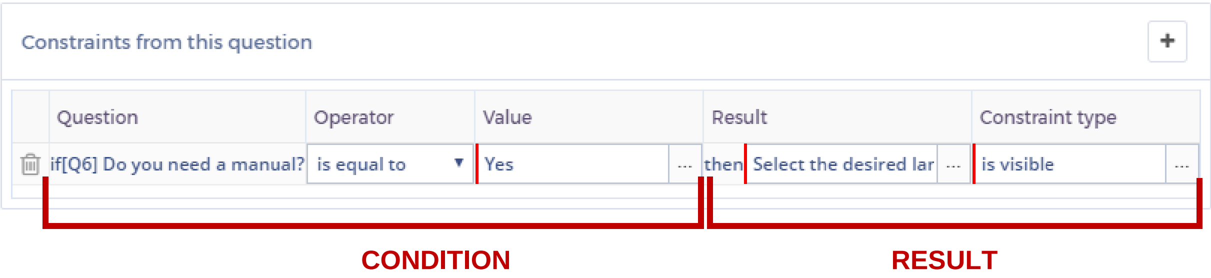
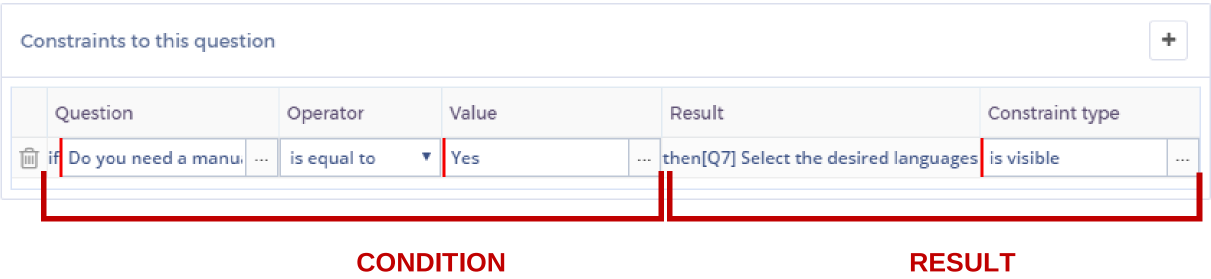
You want to display Q7 only if the answer to Q6 is YES.

If you set up the conditional behavior in Q6, you will create a FROM constraint like so:



If you set up the conditional behavior in Q7, you will create a TO constraint like so:



Whichever way you choose to set it up, the constraint is mirrored in the other question involved.

Other Operations on Questionnaire

Each row in the questionnaire is associated with a set of icons, which allow you to perform several actions. There are also buttons with additional functionalities related to questionnaires.

UI Control	***Description***
Icon	
	Delete a row
	Move a row up or down (click and drag)
	Edit the settings of a question, sub-section, or section
	Duplicate a row
Button	
Preview	View the questionnaire as it will be displayed to respondents
Promote to template	Save your questionnaire as template. Clicking this button opens a new page where you can submit your questionnaire for approval. Once approved, the questionnaire will be added to the template list.

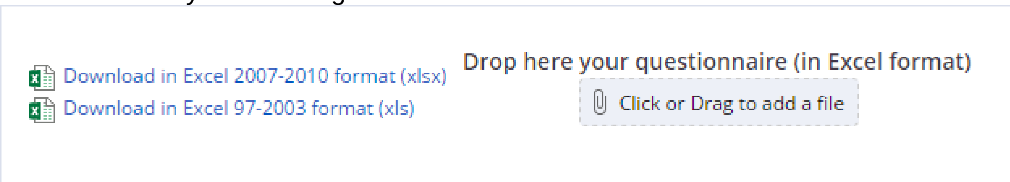
Uploading a Questionnaire Using an Excel File

Editing a questionnaire using Microsoft Excel® involves the following steps:

- Downloading the questionnaire in Microsoft Excel® format
- Editing the questionnaire: you add or edit sections/sub-sections and questions in the downloaded Microsoft Excel® file.
- Importing the questionnaire: you upload the questionnaire in IVALUA.

Downloading the Questionnaire in Microsoft Excel® format

1. Display the **Questionnaire** tab.
2. Click the appropriate **Download in Excel Format** option, depending on the Microsoft Excel® version you are using.



The download process will vary depending on the web browser you are using.

3. Save the file to the desired location, and then open it in Microsoft Excel®.

Adding or Editing Sections or Questions to the Microsoft Excel® File

The Microsoft Excel file includes several sheets (tabs):

- An “Instructions” sheet: contains instructions for using the file; we recommend that you peruse this tab.
- A “Questions” sheet: contains all the questionnaire sections/sub-sections and questions.
- A “Constraints” sheet that lists conditional behaviors associated with questions

This section will guide you through the creation and editing of questions and constraints.

Questions

An easy way to figure out how to create the various types of sections, sub-sections, and questions, as well as set related options is to create test questions of each type, and then download the Microsoft Excel file.

	A	B	C	D	E	F	G	H	I	J	K
1	Label	Description / Hints	Type	Multiple evaluators allowed	Display mode (answer)	Selector	Choices for answer	Mandatory Answer	A comment can be added to clarify the answer	File can be attached to the answer	Multiples answers allowed
2	**Laptop Technical Specifications**		**Section**	**Yes**				**No**	**No**	**No**	**No**
3	What is your preferred laptop color?		List of values	No	Dropdown list		Black=0 Platinum=0 Does not matter=0	No	No	No	No
4	When do you expect the first delivery?		Date	No				No	No	No	No
5	**Replacement Policy**		**Section**	**Yes**				**No**	**No**	**No**	**No**
6	What is an acceptable delivery service for malfunctioning devices?		List of values	No	Dropdown list		Less than 3 business days;=0 3 to 5 buisiness days;=0	No	No	No	No
7	**Hot Line**		**Section**	**Yes**				**No**	**No**	**No**	**No**
8	Do you require support in French?		List of values	No	Dropdown list		Yes=0 No=0	No	No	No	No
9	Do you require support on Sundays?		List of values	No	Dropdown list		Yes=0 No=0	No	No	No	No

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The table below describes the import file columns and gives instructions on how to fill them out:

Column	Description
Label	Name of the section/sub-section or current question (free text)
Description/Hint	Further explanations or instructions to guide respondents
Type	Section, sub-section or question format type. To access available types, click the cell: an arrow will appear to the right of the cell; click the arrow and select a type from the list:
Multiple evaluators allowed	(only for sections and sub-sections) Indicate whether more than one respondent can be assigned to the section or sub-section.
Display mode (answer)	(only if Question Type = List of values) Indicate how you want your choice list to be displayed. Possible values: Buttons, Dropdown list, Checkbox, Radio buttons, Stars
Selector	(only if Question Type = Selector) Name the selector to be displayed (e.g.: State, Country, Incoterm, etc.)
Choices for answer	(only if Question Type = List of values) List possible answers using the following syntax: Value=X, where "Value" stands for a possible answer and "X" is the number of points assigned to that answer (since questions are not scored for Requirements Gathering questions, assigned points will all be equal to zero) Example: Yes=0 No=0
Mandatory answer	Possible values: Yes/No "Yes" to set the question as required: respondents will not be able to submit the questionnaire unless they have answered all required questions.
A comment can be added to clarify the answer	Possible values: Yes/No "Yes" to add a comment area that will allow the respondent to attach comments to his response, or "No" to discard the comment area.
File can be attached to the answer	Possible values: Yes/No "Yes" to add a file upload area that will allow respondents to attach a file to their response, or else type "No" to discard the file upload area.
Multiples answers allowed	(only if Question Type = Selector or List of values) Possible values: Yes/No "Yes" to allow respondents to choose more than one answer to the question

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Constraints

	A	B	C	D	E	F	G
1	Section	Question	Operator	Value	Section Result	Result	Constraint type
2	Manuals	Do you need a manual?	is equal to	YES	Manuals	Select languages	is visible
3	Laptop Technical Specifications	Do you require support?	is equal to	Yes	Laptop Technical Specifications	Select languages	is visible

The table below describes the columns from the *Constraints* tab:

Column	*Description*
Section	Name of the section that contains the question to evaluate
Question	Question whose response will be evaluated
Operator	Comparison operator: *Is equal to, Is not equal to, Contains,* etc. Available operators depend on the type of question.
Value	Value the response will be evaluated against
Section Result	Name of the section that contains the question affected
Result	Affected question
Constraint type	Behavior if the condition evaluates to true

Uploading the Microsoft Excel® Questionnaire Back Into IVALUA

1. Drop the Microsoft Excel® questionnaire file on the file upload area, or else click this area and select the file.

The *Questionnaire Export/Import* window will be displayed. This screen presents a list of found errors and gives a summary of the sections, sub-sections and questions that will be imported.

2. Click **Import items** to import the questionnaire. A message will indicate that the import was successful.
3. Click **Close** to go back to the *Questionnaire* tab and view imported questions.

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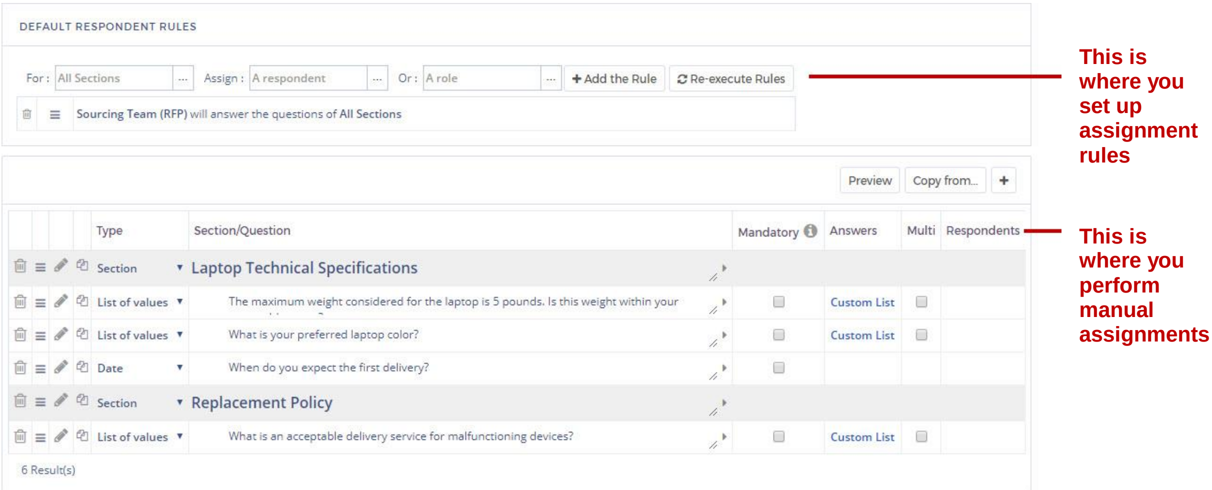
Selecting Respondents

Respondents are assigned in the *Questionnaire* tab.

If you have copied your questionnaire from a survey or a template with respondents already set up, these respondents will be copied into the current survey.

However, you can select other users by applying assignment rules or manually.



Creating Respondent Assignment Rules

The respondent rules define how respondents are assigned to your questionnaire. You can create rules by using the *Sections*, *Respondents* and *Roles* selectors.

1. Select the desired sections in the *Sections* selector (if it is displayed and you wish to restrict your rule to a given part of the questionnaire).
2. Select the respondents. Use the *Respondent* selector if you wish to name a specific user. Otherwise, select a role.
   A role is a function that calls on users responding to a number of criteria. In this context, the chosen role should be in relation with sourcing project requirements. Here are some examples of available roles and a description of the users they return.

Label ▲		Description
Sourcing Team (RFP)		RFP Only. Returns the people belonging to a team of a sourcing event. If the parameter "Role" is specified, only the people having that role in the team will be returned.
Internal Team (Supplier, Contract, Sourcing event)		Returns the people belonging to a team of the evaluated object (Supplier, Contract, Sourcing event, ...). If the parameter "Authorization" is specified, only the people having that authorization in the team will be returned.
Associated Sourcing Event's Team (supplier scoring)		Supplier Evaluation ONLY. Returns the people belonging to a team of a sourcing event, for which the evaluated supplier has been consulted. If the parameter "Role" is specified, only the people having that role in the team will be returned.

3 Result(s)

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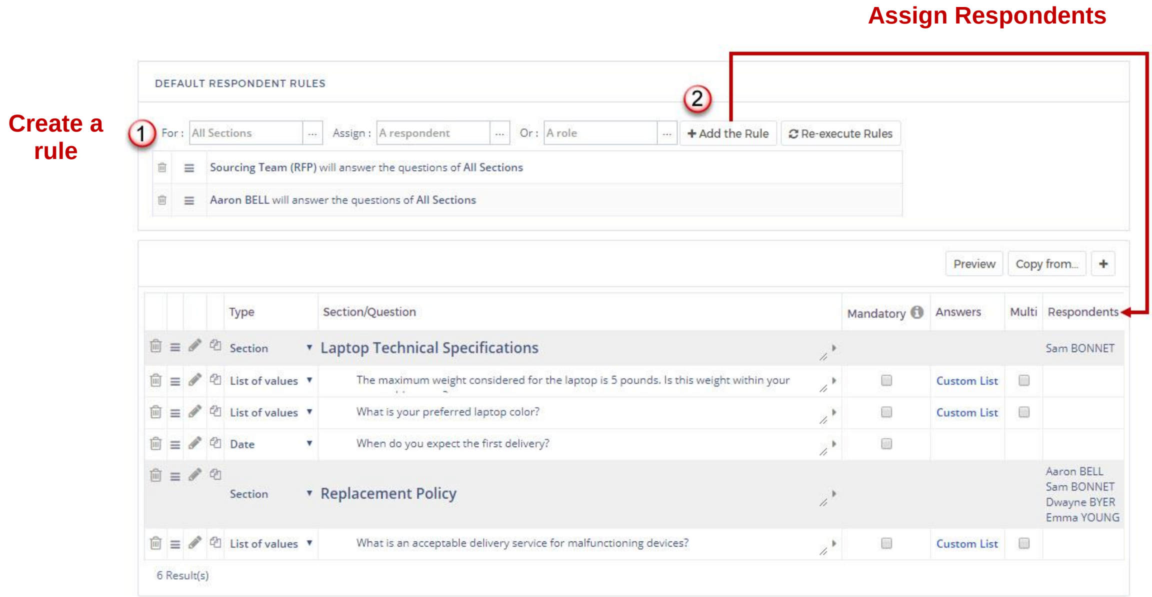
3. Click the *Add the Rule* button.
   The new rule is inserted into the rule list and applied.



> ***Notes***
>
> In your questionnaire each section and sub-section contains the *Several respondents allowed* option.
>
> If this option is deselected, only one respondent can be assigned, and the rules are applied in the order they are defined in the rule list until a respondent is found.
>
> If this option is selected, all the rules are applied, and all users found are added as respondents.

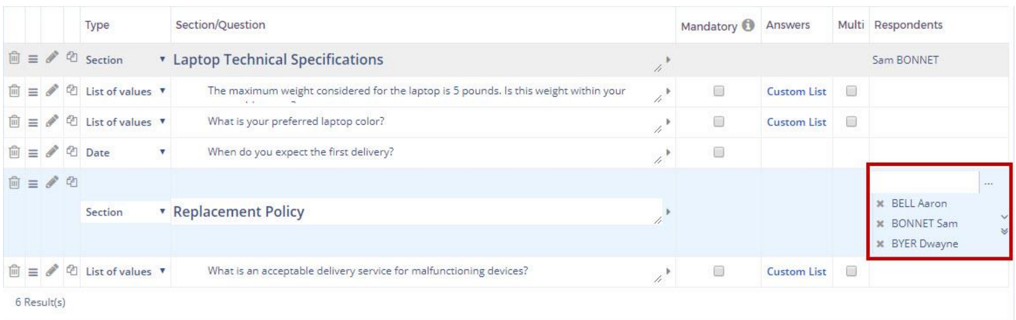
If you have multiple rules, you can reorder them by clicking the *Move row* icon ☰ next to the rule you wish to move and dragging it to the desired position.

To re-apply the rules after you have modified the rule list (reordered or deleted some of them), you must click the **Re-execute** button. Similarly, use this button if you have manually assigned respondents and wish to go back to the rule assignment.

Manually Assigning Respondents

The *Respondents* column in the questionnaire grid allows to manually add or remove respondents.

1. In the *Respondents* column, click inside the cell you wish to edit. The cell becomes editable.
2. Select the desired user or remove the existing one.



3. Save the campaign page.

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Opening the Campaign for Input and Tracking Progress

Opening the Questionnaire Forms for Input

Once your campaign is completely configured, you can open it to enable respondents to complete the questionnaire. To do so, click the **Open for Answers** button. This will trigger an email notification to the selected respondents.

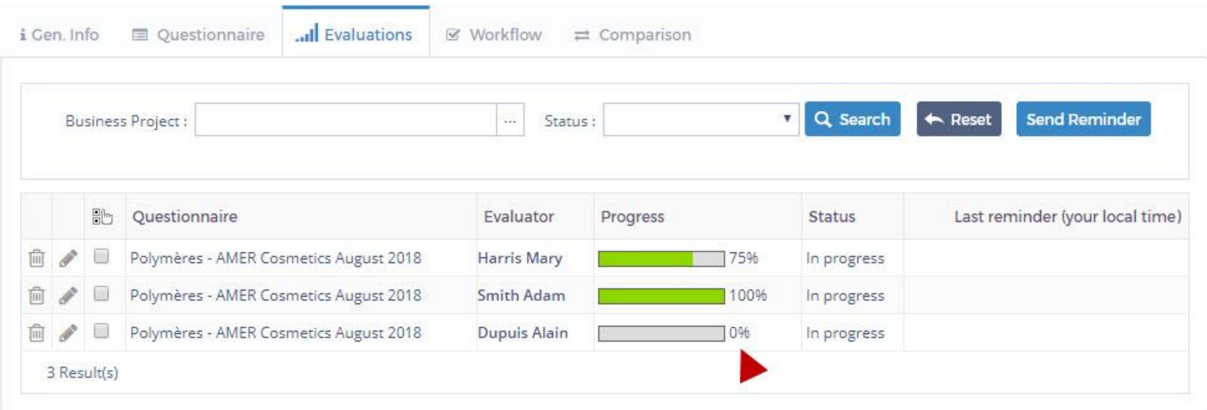
Remember that the begin date on the *Gen. Info* tab is displayed for information purposes only. Even if the begin date is reached, you must open the campaign manually.

As long as the campaign remains open, the respondents are able to complete the questionnaire and submit it for approval.

Tracking Progress

You can monitor the completion of the campaign progress on the *Gen. Info* tab. The campaign progress is computed as the number of answered questions related to the total number of your campaign questions.

You can also visualize each response progress on the *Evaluations* tab.



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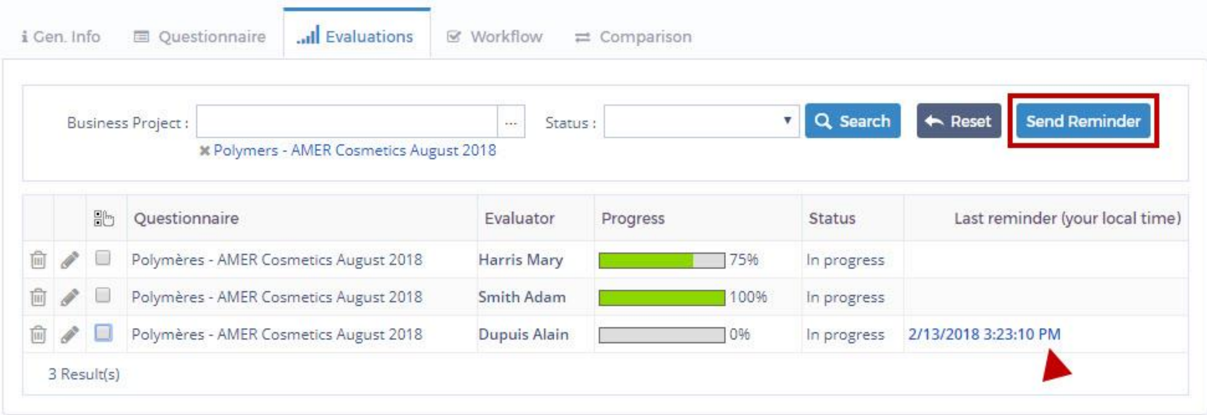
Sending a Reminder to Late Respondents

On the *Evaluations* tab, select the checkbox of the respondents you wish to send a reminder to, and then click **Send Reminder**. Selected respondents will receive an email notification.

The date and time the reminder is sent is logged in the *Last reminder* column.



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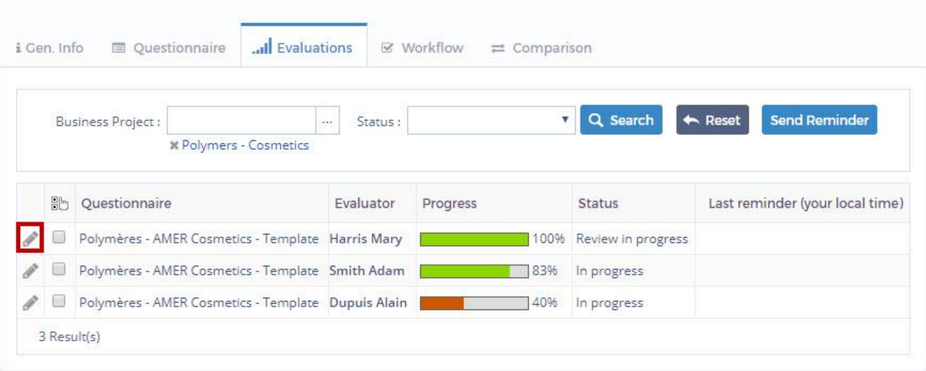
Reviewing and Approving the Completed Forms

Accessing Questionnaire Forms

Once a respondent submits a completed questionnaire, you receive an email notification. To review the questionnaire, click the link provided in the email.

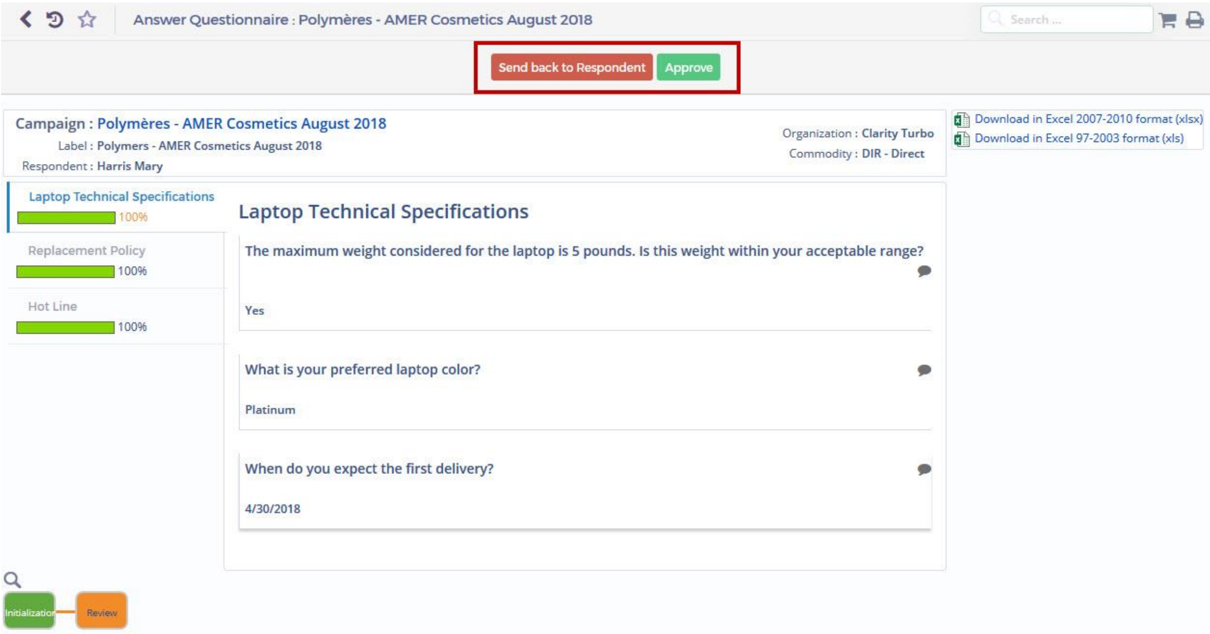
You can also access the questionnaire directly from the IVALUA web UI:

- In your pending validations list
- In the *Evaluations* tab of your survey campaign.



Approving or Sending Back a Completed Questionnaire

At this stage, you can approve the questionnaire or send it back to the respondent (for example, to get more specific information on some questions).



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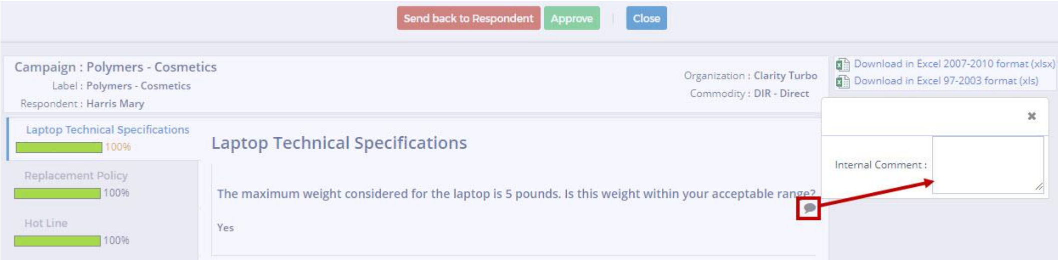
If you wish to send the questionnaire form back, you can use the *Comment* icon associated with each question to ask for clarifications or make any comment you deem necessary.

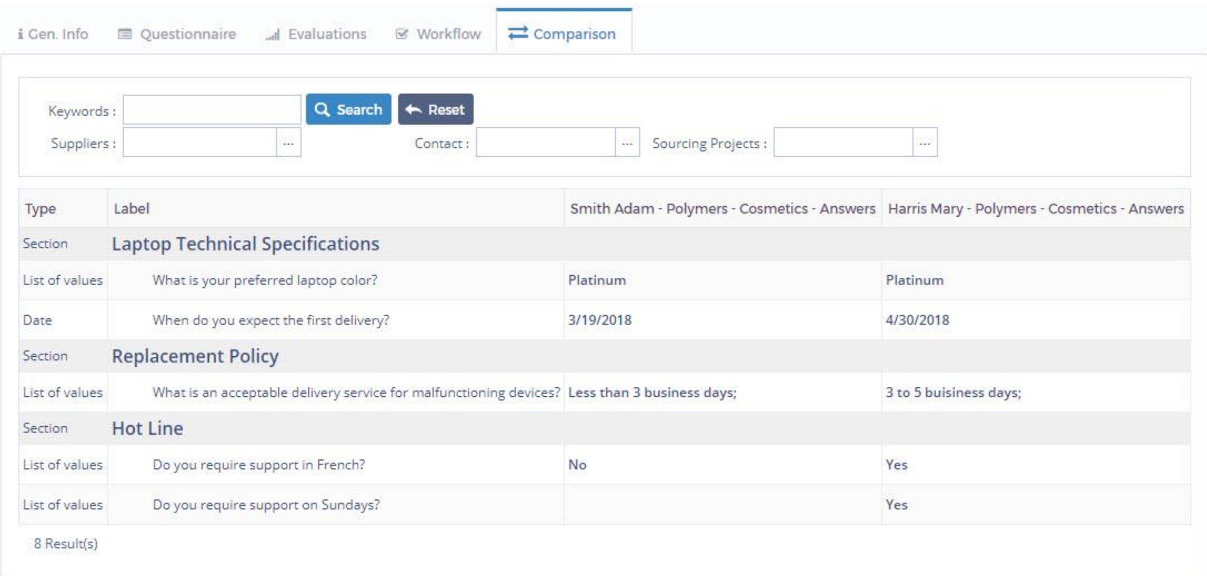


When done, click **Send Back to Respondent**. The respondent is notified by email. He can spot and access your comments by looking for and clicking on orange *Comment* icons . He can respond in the *Internal Comment* text box and re-submit the completed questionnaire. Comments are displayed in the *Comparison* tab.

Analyzing the Survey Results

The *Comparison* tab allows you to get a complete overview of the survey answers. Only approved questionnaire forms are integrated into this tab. In the answer grid, each column represents a respondent.

If you have a lot of answers, use the *Contact* filter to show the answers of a specific respondent.



Closing the Survey to Input

There are two methods for closing a campaign:

- *Autoclosure*: if this option is selected in the *Gen. Info* tab, the campaign will end automatically once the end date is reached. If it is deselected, the campaign remains open after the end date passes, until you close it manually.
- Manual closure: To close the campaign manually, click the **Terminate** button in the action bar. The campaign will close whether the end dated is reached or not.

Once the campaign ends, its status switches to *Closed*. The status of questionnaire forms that haven't been submitted for approval changes to *Cancelled* and respondents can no longer complete them.

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GATHER SUPPLIERS Step

Presentation

The suppliers step is where the list of potential suppliers is first gathered. Through the process, including coming RFI and RFP steps, that list may be reduced, but on this screen, it is best to include all possible suppliers.

This section describes the list of suppliers (below) and explains how to:

- Add suppliers to the list, p.64
- Create new suppliers, p.65
- Select a main contact for each supplier and making sure they have login credentials, p.65
- Reduce the list of suppliers, p.66
- Extract the supplier list to MS Word®, p.66

List of Suppliers

Suppliers added at the *Gather Suppliers* step are listed as follows:

The table below gives a description of the fields and other controls in the list and how to use them:

Icon	***Description***
	Deletes the supplier from the preselection list
HEWLETT PACKARD FRANCE	Name of supplier (clickable link that will display the Supplier Record in a secondary window)
Status	Status of suppliers in their approval workflow (Supplier Record)
Main contact	Main contact (to be selected among the contacts with a *Validated* déclarés dans la fiche du fournisseur)
	To automatically create login credentials for the contact and send them an invitation to log in
	To manually create login credentials for the contact
	Indicates that the contact has been blocked (*Contacts* tab of the Supplier Record) and can no longer log in to the application. Select another contact or edit the status of this contact. N.B.: Blocked contacts cannot be selected. This icon indicates that the contact has been blocked since it was selected.
+	To create a new contact for this supplier
Nature of consultation	To log the nature of the supplier's inclusion in the list (Known and used, New potential bidder, Required by specialist/engineer)
Risk	When the Risks module is enabled, this column shows the risk rating obtained by the supplier
C	Suppliers invited to bid: These are the suppliers who will be maintained in the list of participants and who will be listed again in the subsequent steps of the project. By default, all suppliers in the list have their checkbox selected. If you no longer want one

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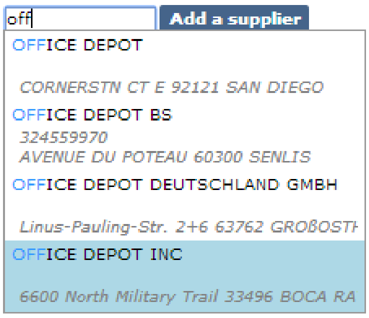
	of these suppliers to be invited to bid, you can: ▪ Delete it from the list (✖): The project will keep no trace of their selection ▪ Unclick their “C” checkbox: The supplier will no longer be listed in the subsequent steps of the project, but their selection early in the project wil be recorded, as well as any comments/files attached
	Click to insert a comment about the choices made or to attach a file to this supplier, or else to view existing comments/attachments. The presence of comments/attachments is signaled by an orange icon .

Adding a Supplier to the list

1. Display the *Gather Suppliers* step.

2. Search for and select suppliers.
To do so, you can use the quick search field or access the supplier selector for a more targeted search.
   - **Quick search**: In the search box, type parts of supplier’s names to quickly search the supplier database. NOTE: The behavior of this auto-complete field is configurable: by default, only suppliers within the scope of the Sourcing Project (defined by the commodity family) will appear; however, this restrictioncan be cancelled (parameter "bpm_supplier_restrict_family").



   - **Selector**: click the button **Add a Supplier**.
     A supplier selector will display. By default, suppliers are filtered on the main commodity of the Sourcing Project (can be modified).
     Select the appropriate filters, and then click **Search**.
     Select suppliers by selecting their checkbox. You can also do a mass selection by clicking in the column header.

Suppliers selected here are but a preselection: you will be able to reduce this list in this step (p.66) or during the next step (p.124).

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Creating a New Supplier

If the supplier you wish to add is not yet in the IVALUA supplier repository, you may add them here, without opening the Supplier Repository (functionality is available to the Sourcing Project owner or any contributor who is granted the authorization to create new suppliers).

1. In the *Gather Suppliers* step, click the **Add a supplier** button.
2. In the window that will display, click the **Create new supplier** button.
3. Fill in the Supplier Record, and then click **Save and close**.

   Suppliers added this way will be automatically added to the Sourcing Project's supplier list but will also be added in the repository and may be subject to supplier management processes run on suppliers in certain states.

Selecting a Main Contact for Each Supplier and Making Sure They Have Login Credentials

The main contact is the person who will be receiving subsequent communications (like Requests for proposal). To access and respond to future communications, this contact must be able to log in to the IVALUA supplier portal; to do so, they will need a user account.

When selecting the main contact for each supplier, you will encounter one of the following situations:

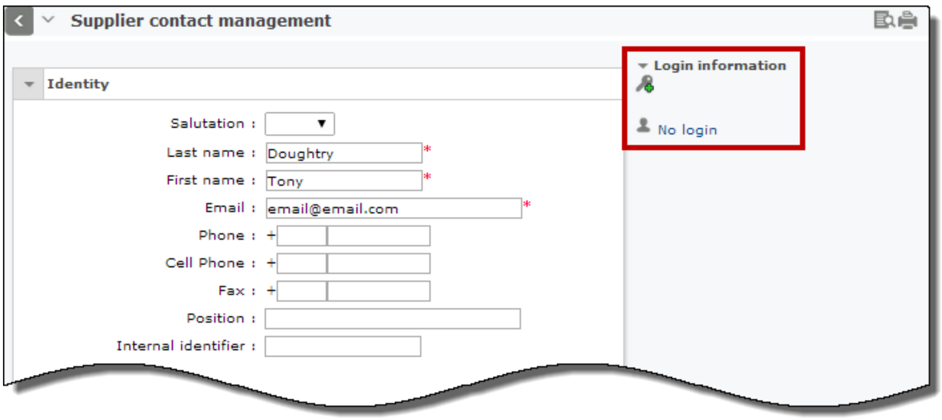
- The contact already exists in the *Main contact* list and has an account login and password assigned (login displays in parentheses).

  ➔ All you have to do is select the contact.
- The contact exists in the *Main contact* list but does not have an account login and password assigned (this is noted in the parentheses next to their name).

  ➔ You can select the contact and create their user account using the icons and .
- The contact is not in the *Main contact* list (it was not created in the Supplier Record).

  ➔You can create a new contact by clicking the icon +

  Fill in their record and click **Save**. After saving, the icons and will appear in the record, allowing you to create a user account for the contact.



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Reducing The Supplier List

By default, all suppliers added to the suppliers list will be invited to participate in the RFx and will be listed in the subsequent steps of the project. This is materialized by the selected checkbox in the “C” (consultation) column.

You may reduce this list as needed by deselecting the checkbox.

Extracting the Supplier List to MS Word®

Extracting the suppliers list allows you to use it outside of IVALUA.

1. On the *Gather Suppliers* step, click **Extract supplier list**. A window of Sourcing Process templates will appear.
2. Click the icon of the template to use. The file will be downloaded to your computer following the procedure of your web browser.

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PREPARE RFP Step

Introduction

Presentation

The RFx step allows for:

- Creation of a set of documents for consultation with suppliers
- Management of different elements of the request (table or grid of items, suppliers to invite, questions to ask, and documents to consider)
- Preview of the request elements from the suppliers' point of view as a test before they are sent to the supplier
- Sending the request to all invited suppliers

Since the RFx may include many rounds and/or different lots, the RFx step manages the creation, diffusion and closure of each of these elements.

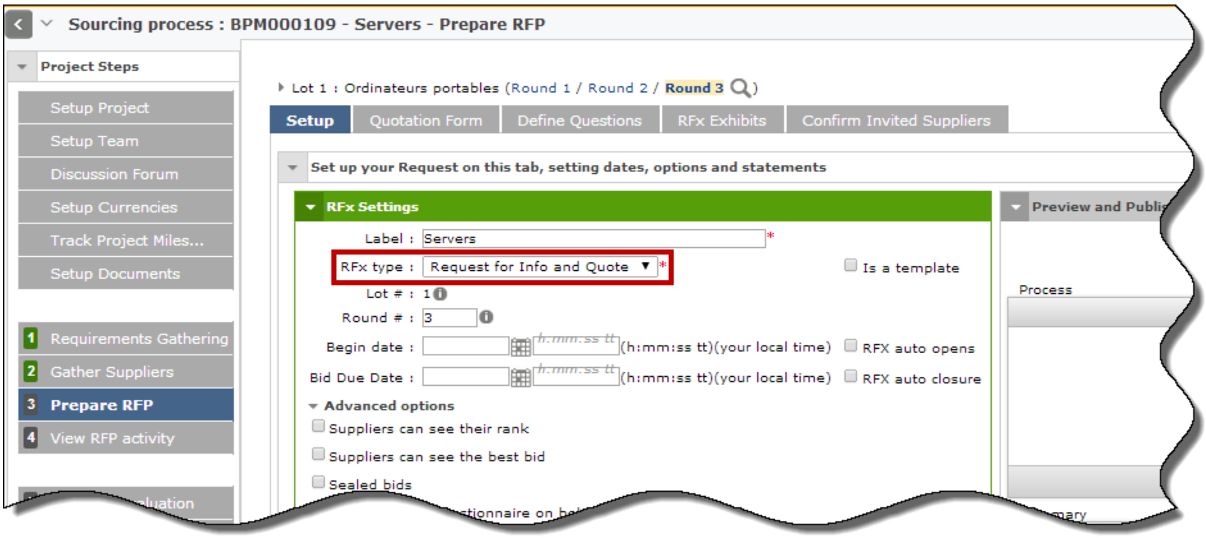
RFx Types

Sourcing Project types may be associated with one or many RFx types.

The configuration of each RFx type, by extension, determines the following:

- The format of the RFx (tabs and their contents and how they are seen differently on the buyer side and the supplier side)
- Available advanced options
- The format of later stages when the responses are analyzed (for instance, no awarding functions if the type is RFI)

If the Sourcing Project is associated to multiple RFx types, the Sourcing Owner may choose the specific type from the *RFx Type* dropdown field on the General Information tab of the *Prepare RFP* step.



After the RFx is sent, the choice of RFx type cannot be modified.

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RFx Contents

Depending on the RFx type and configuration, the following tabs may be available:

Tab	*Description*
Setup	▪ Name and round/lot numbers of the RFx ▪ RFx Type (if multiple are available based on the configuration) ▪ Open and close dates as well as auto-open/auto-close options ▪ Advanced options ▪ Open text fields for noting the nature of the *Process* and the *Summary* of the request
Items	▪ Grid of items for quotation ▪ Multiple grids are possible, each with its own specific columns
Questionnaire	Create or import a questionnaire (RFI)
RFx Exhibits	Attach documents for review by Suppliers
Suppliers	Further reduce the list of suppliers (from the Suppliers step) that will be invited to respond to this specific request.

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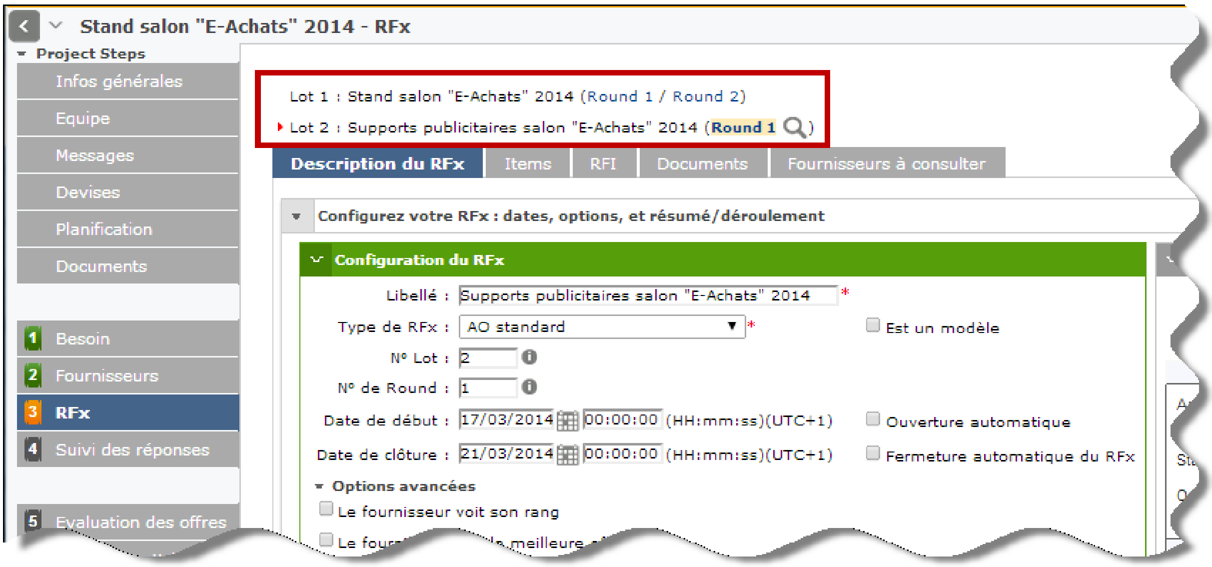
RFx Multi Round/Multi Lot

IVALUA lets you manage your RFx by lots and/or rounds:

- *Lots*: multiple lots may be managed simultaneously. For example, for a major commodity, several sub-commodity lots may run in parallel.
- *Rounds:* as results come in, the buyer team may elect to follow with another request building on the previous responses, perhaps adjusting target pricing or down-selecting certain suppliers as the rounds progress.

If the RFx includes more than one round, the different rounds and lots are listed at the top of the page and the round that is currently displayed is highlighted:



Upon opening the *Prepare RFP* step, the most recent open round shown.
Change the round/lot you wish to see by clicking on the round noted within the lot. This choice is remembered until you exit the Sourcing Project

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Creating an RFx

Presentation

You may create an RFx from scratch, from a template or from a previous RFx in the system.

Creating a New RFx From Scratch

1. When you enter the *Prepare RFP* step for the first time, only the General Information tab is active.
   Certain fields are already filled in (change them if necessary):
   - Name of RFx (copy of name of Sourcing Project)
   - Lot and Round are set to 1
   - Begin Date for the RFx is defaulted to the date RFx step is opened.
2. If the current Sourcing Project allows for the creation of different types of RFx, there will be a *RFx Type* drop-downlist: Select the RFx type you want to create.
3. Select a Bid Due date
4. Save.
   Depending on the RFx type, different tabs are now activated across the top. In addition, specific Advanced Options are now noted at the bottom of the RFx *Setup* tab.
5. Modify Advanced Options (see page 77).
6. Fill in the *Process* and *Summary* text boxes as necessary. These text boxes have a formatting bar available if necessary.
7. Save.

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Creating or Completing an RFx Based on a Template or Previous RFx

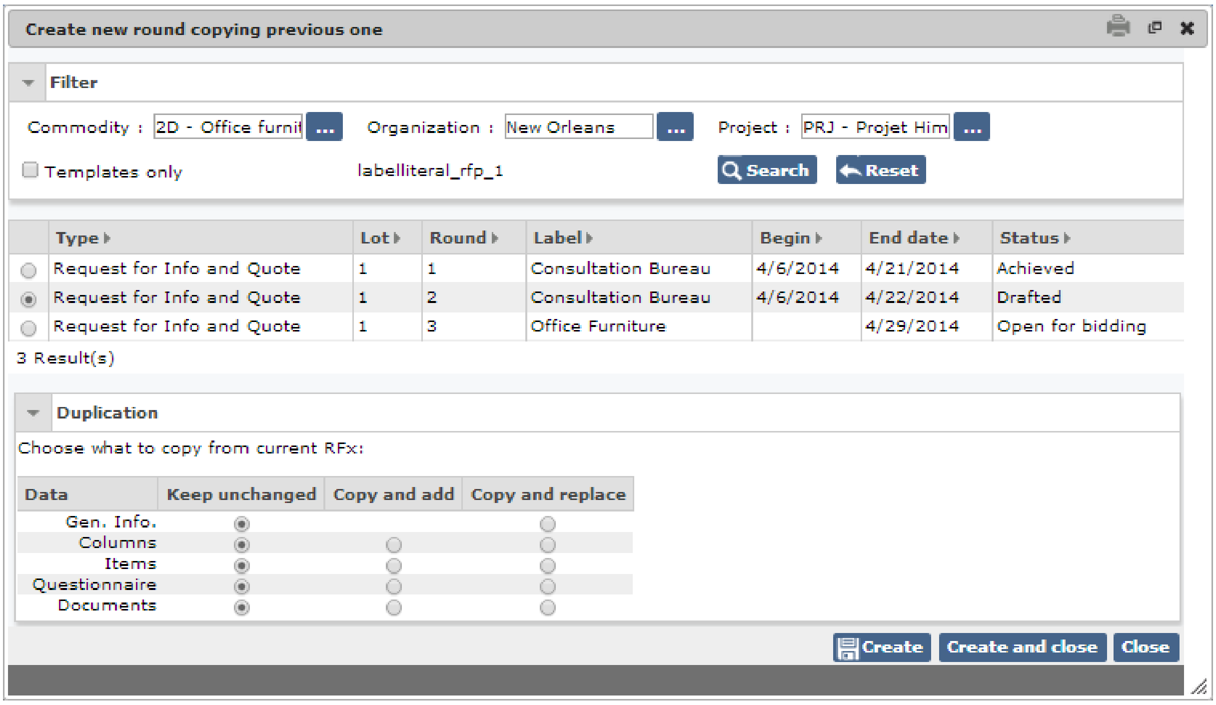
Round copy allows you to copy certain elements of a template round or a regular round attached to the same commodity (for instance, you may create an RFP based on an RFI).

1. <u>If the RFx has not yet been created</u> and you want to create it from a template or other existing round from the Sourcing Project, select the type of RFx (if choices are available), and then click the **Other Actions > Create from Template** button on the action bar.

   <u>If the RFx already exists</u> and you want to import aditional elements from a template or other existing round from the Sourcing Project, click the **Other Actions > Get data from RFx/Template** button on the action bar.

   The window *Create new round copying previous one* opens. It lists the rounds of the current Sourcing Projects and templates attached to the same organization, commodity and umbrella project (if any) as the current Souricng Project. You may elect to remove or change these filters depending on your authorizations.

   You can use the *Template only* checkbox to display only RFx that are marked as templates (see also *Managing RFx templates*, p.74).



2. Select the RFx you wish to copy.
3. The *Duplication* area opens up based on the contents of the chosen RFx. Elements that may be copied may include the following:

Data	***Description***
Gen. Info.	Data from the *Setup* tab
Columns	Columns from the quotation form (*Items* tab) Select to copy the quotation grid format, sans copier son contenu (les items).
Items	Rows from the quotation form (*Items* tab) To copy the quotation grid format and its content (items), select both *Columns* <u>and</u> *Items*.
Questionnaire	Questionnaire from the *Questionnaire* tab
Documents	Documents from the *RFx Exhibits* tab
Evaluations	Proposal evaluation setup (questionnaire, weights, evaluators, etc.)

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For each element, possible actions are:

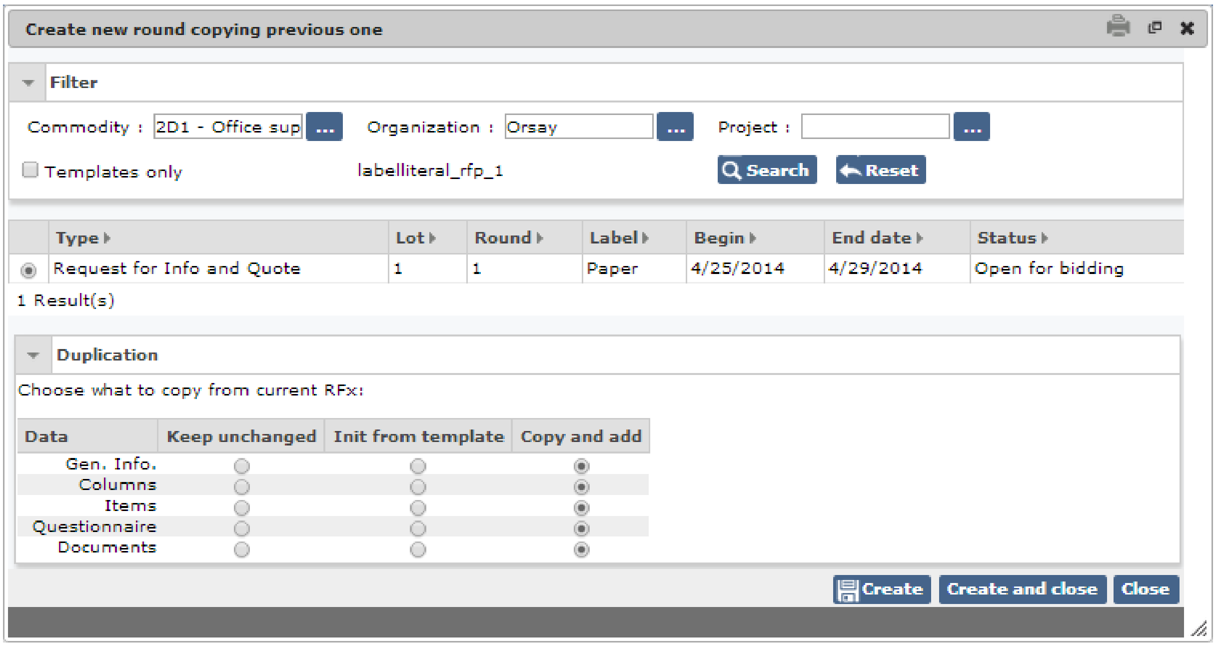
Action	*Description*
Keep unchanged	Element will be ignored
Init from template	(only when creating a new lot or round) To copy the structure of the template without the data it contains (format of the quotation form without the items, for instance)
Copy and add	To add the selected data to a new round or to existing data of the current round
Copy and replace	To copy the selected data and replace existing data

4. Click **Create and Close**.
   A window will pop up to confirm and summarize the action.
5. Click **Continue** as confirmation.
6. Be sure to review. Especially:
   - Dates that may need updating from the old event.
   - Advanced options which may be different
7. **Save**.

Managing Lots

Creating a Lot

1. Select the *Prepare RFP* step.
2. Click on the button **Create a new lot**.
   The *Create new round copying previous one* window pops up. You are presented with existing rounds of the Sourcing Project.



3. Select the round that will serve as a template for the new lot.
4. In the *Duplication* area, deselect those elements you do NOT want to duplicate.
5. Click **Create and Close**.
   The new lot is created with a status of *Drafted.*

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Managing Rounds

Lifecycle of a Round

Below are the status of a round from opening to closure:

State	*Trigger action*	*Description*
Drafted	Create round	The round is in the course of being defined.
Open to bidding	Send to Suppliers	The round is sent to the suppliers for bidding.
Achieved	Close Round	The round is closed and no supplier can submit offers. For sealed bids, the buyer may now open the offers.
Proposals available (for Sealed bid offers only)	Open sealed bids	Buyer may now analyze sealed bid offers.

Creating a New Round

1. Select the *Prepare RFP* step.
2. The new round will be added to the currently displayed lot; so if you have several lots, be sure to display a round from the lot you want to add the new round to.
3. Click on the button **Other Actions > Create a new Round**.
   The *Create new round copying previous one* window pops up. You are presented with existing rounds of the Sourcing Project.
4. Select the round that will serve as a template for the new round.
5. In the *Duplication* area, deselect those elements you do NOT want to duplicate.
6. Click **Create and Close**.
   The new round is created with a status of *Drafted.*

Closing a Round

1. Select the *Prepare RFP* step.
2. Display the round you want to close.
3. Click the button **Other Actions > End RFx round**.
4. Confirm the closure and click on the button **OK**.
   The round is closed and its status moves to *Achieved*.
   It is possible to re-open a closed round by clicking the **Open** button.

Deleting a Lot/Round

Users with required authorization may delete an RFx as long as it isn't open for bidding.

1. Select the *Prepare RFP* step.
2. Click on the round that will be deleted.
3. Click the button **Other Actions > Delete RFx**.
4. Confirm the pop up mesage by clicking on the **OK** button

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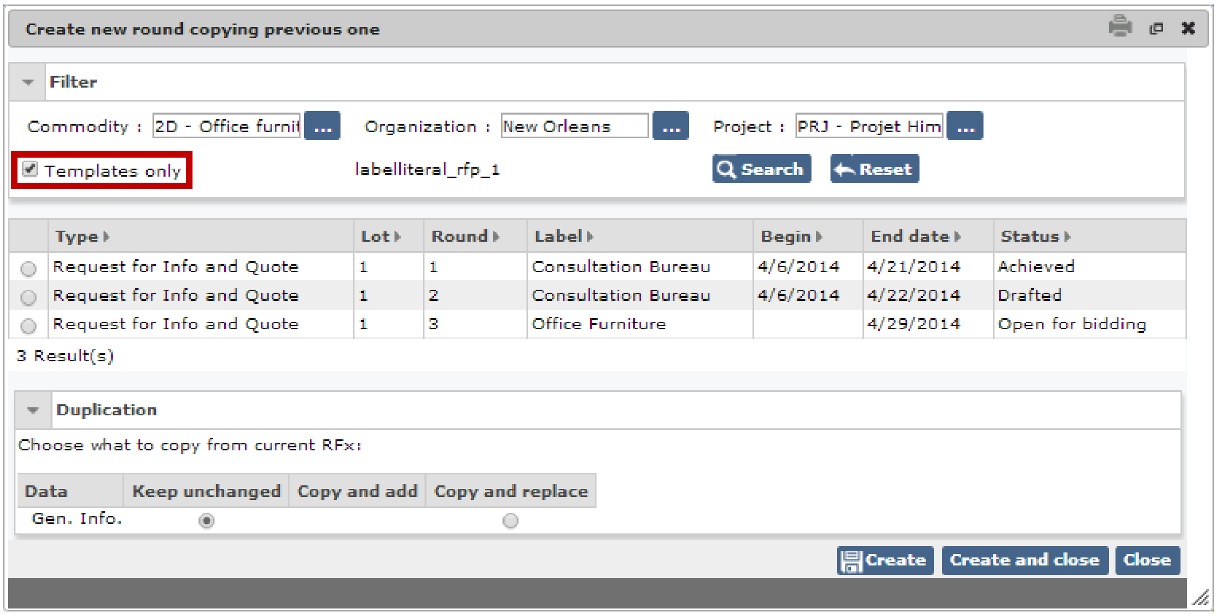
Managing RFx Templates

About RFx Templates and Duplication

It is possible to copy data from any RFx to another whether the source RFx is a template or not.

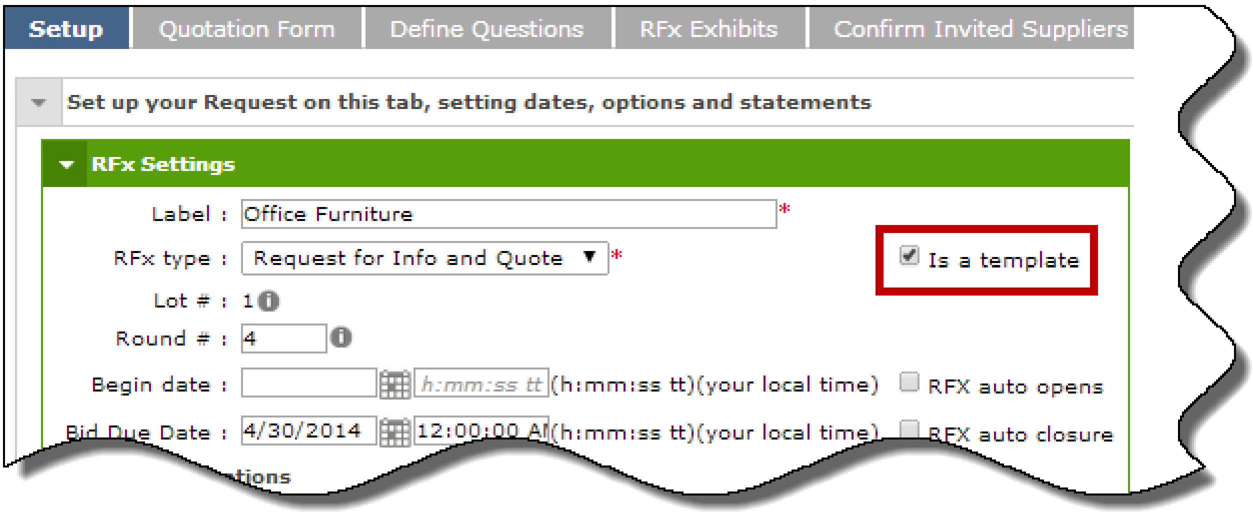
However, it is also possible (and perhaps recommended) to filter the RFx list to show only templates.



To obtain further instructions on duplication, see *Creating or completing an RFx based on a template or previous RFx*, page 71.

Marking an RFx as a Template

1. Select the *Prepare RFP* step.
2. Open the *Setup* tab.
3. Select the option *Is a Template.*
4. **Save**.



Opening and Closing an RFx

Setting the Opening and Closing Dates of the RFx

The Bid Due date must be set in order to allow for the RFx to be sent out.

1. Go to the *Prepare RFP* step.
2. On the *Setup* tab, set the *Begin date* and *Bid Due date*. You may use the calendar icon to select the dates instead of typing them in.
3. **Save**.

Some *Advanced Options* may affect the closure date ("Buyers can change bid due date"). For more details, see *Setting Advanced Options*, page 78.

Choosing the Way the RFx is Opened

Presentation

Opening the RFx for bidding allows for invited suppliers to respond to the request.

It can be done in 2 ways:

- Automatic open on the defined *Begin date*
- Opening at the moment of sending the RFx

Both methods are detailed below.

Automatic Open on the Defined Begin Date

To set the RFx to open automatically upon the date set in the *Begin date* field, select the option *RFX auto opens* (on the *Setup* tab).

When you choose this option, a **Validate** button appears so that you can test the coherence of all the dates in the RFx. Valid documents pass to the read-only state but another **De-validate** button may be used to edit the RFx if necessary.

Choosing *RFX auto opens* allows for you to separate the sending of the RFx from the opening of the RFx. That is, you could send the RFx ahead of opening for responses so that suppliers have time to review it and prepare for the open proposal period.

Opening at the Moment of Sending the RFx

When *RFX auto opens* is not selected, the RFx is opened at the moment it is first sent out to suppliers. Both events (sending and opening) occur concurrently (see *Sending the RFx*, page 127).

Choosing the Mode for Closing an RFx

By default, an RFx round is closed when the user clicks the **End RFx round** button.

Depending on the configuration of the RFx an option to close automatically could be available, could already be checked and could be locked from being de-selected.

If the option *RFX auto closure* is selected, the RFx status will automatically be changed to *Achieved* status once the Bid Due date is attained.

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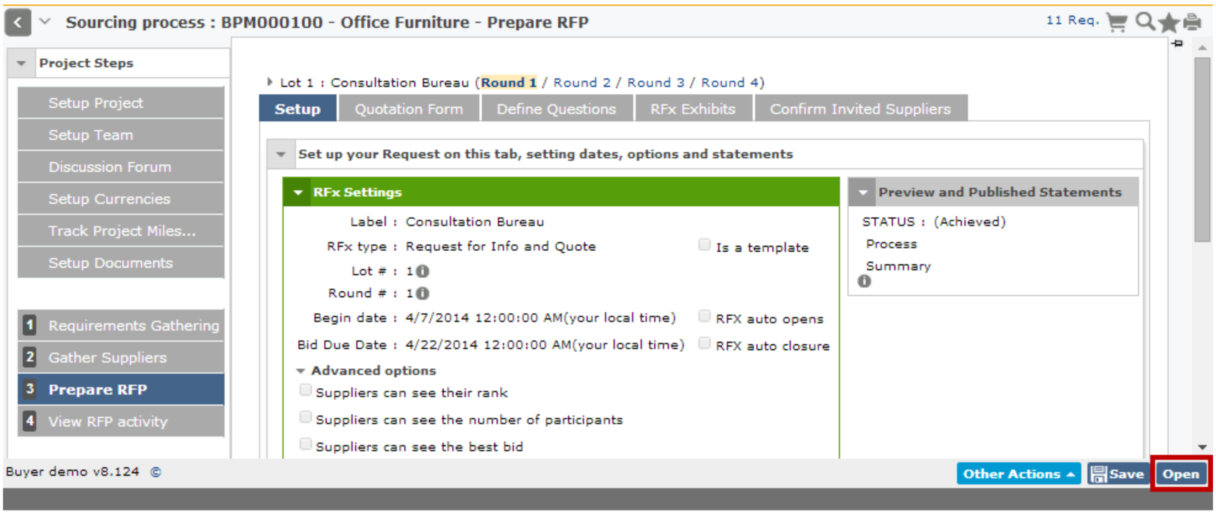
Re-Opening a Closed RFx

In the closed round you want to re-open, click the **Open** at the bottom of the page.



The RFx is opened in a *Draft* status.

Working with RFx Advanced Options

Advanced Options define the rules governing many aspects of the RFx.

Option	***Description***
Buyers can acknowldege receipt of bids	Buyer has an Acknowledge Receipt button to tell suppliers that their proposal has been duly received
Buyers can bid on behalf of suppliers	Buyer may fill out and send a proposal for suppliers based on, for example, the results of an offline conversation with the supplier. This is important when some suppliers are answering on the RFx in the system and others are sending their proposals over the phone or in emails and attachments. The buyer, then, may capture the “offline” bids and input them so all offers may be compared in the system. This functionality may also be used to capture a counter-offer drafted by the buyer for the supplier, but then further edited and eventually validated by the supplier.
Buyer can change bid due date	During an open RFx the buyer may decide to extend (or accelerate) the process by changing the bid due date.
Buyers can fill questionnaire on behalf of supplier	Buyer may need to capture offline responses to the RFI questionnaire by filling in those responses on behalf of the supplier. This aids in the eventual comparison between suppliers’ responses.
Buyer can access and award un-submitted bids	While supplier proposals are in the draft state, certain cases exist where a supplier may want the buyer to view the draft and make suggestions before the final submission is made by the supplier.
Supplier must sign a Non Disclosure Agreement	Certain organizations may require a signed NDA before allowing the supplier to see their RFx.
Suppliers must acknowledge	Suppliers are allowed to read but cannot respond to an RFx until they acknowledge receipt and then mark their intention to respond.
Suppliers can see the best bid	The value of the best bid is shown in the My RFx area of all other suppliers in the RFx invited list.
Suppliers can see the number of participants	The number of suppliers invited to the RFx are noted on the My RFx screen.
Suppliers can see their rank	The rank of the supplier among all other competing offers is noted on the My RFx screen.
Sealed bids	Supplier responses are not viewable by the Buyer until the round is closed. Choosing this option renders the following options unavailable for selection: ▪ Buyer can fill questionnaire on behalf of suppliers ▪ Buyer can bid on behalf of suppliers
Allow viewing of detail RFx to unconnected users	In public request for proposals, enable this option to allow suppliers to access the contents of the request without having to register and be connected. This option is not compatible with the option “Supplier must sign a Non Disclosure Agreement”.

Availability and Setting of Default Options

The administrator defines which options are available for each RFx type, and:

- whether each option is selected or not, and
- whether the default value is changeable or not

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Setting Advanced Options

1. In your Sourcing Project, go to the *Prepare RFP* step.
2. In the *Advanced options* area, select and/or deselect the options as appropriate for this round of the RFx.
3. **Save**.

Items

The *Items* tab is where the buyer will define one or more pricing grids where he will note the list of products and services to be sourced and any other cost items to be taken into account. While not mandatory, this list of items and the supplier's quantitative response to the request allow for a well-defined comparison of the proposals from different suppliers.

If an RFx is built from a Requisition, the lines of the requisition selected during setup are automatically added to the *Items* tab. They may be adjusted on this tab, however, without affecting the requisition.

If the RFx is created from scratch you may add items directly on the screen or upload them using a MS Excel® form.

Item Types

Pricing grids may include the following cost elements:

Type d'item	***Description***
Required item	These are the items to be sourced per se (default). Items are included in the proposal's total amount.
Optional item	This type allows suppliers to offer optional items that relate to required items. Optional items are not included in the proposal's total amount.
Additional fees	This type allows suppliers to declare des coûts additional costs linked to required items (transport, for instance). Additional fees are included in the proposal's total amount.
Price Adjustment	Price adjustments are cost items that may be added by the buyer and that remain hidden to suppliers (cost of a supplier change, for instance). Price adjustments are included in the proposal's total amount.

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Working With Pricing Grids

Presentation

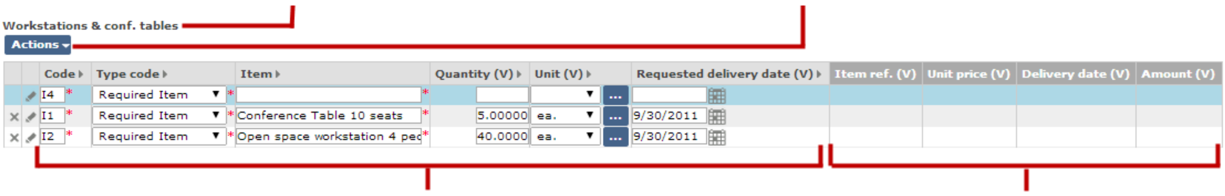
By default, the *Items* tab contains the pricing grid(s) that have been predefined for the selected RFx type.

Name of the pricing grid

(defined in the grid settings: full label or, if not provided, short label)

Actions button

Access to grid and item management features (create, edit, delete)



Columns filled in by the buyer

(light gray column header)

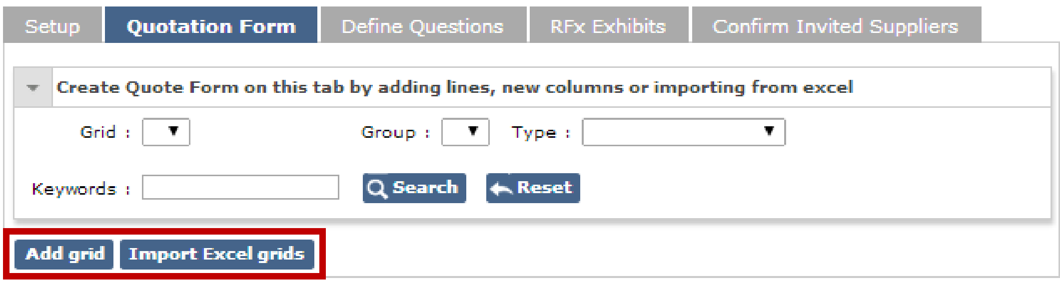
Columns to be filled in by the supplier

(dark gray column header)

The buyer may elect, however, to change the pricing grid by deleting, moving, or adding columns as necessary (see page 81).

Where items differ greatly from each other, it is possible to create multiple grids so that different columns can be added to capture the nature of the items requested or the supplier response desired.

When the *Items* tab does not contain any grid (default grid has been deleted, for instance), 2 buttons become available: **Add grid** and **Import Excel grids**. Use these buttons to create new grids.



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Managing Pricing Grids

To manage Pricing Grids click on the action buttons above the grid.

Click on...	*To...*
Add grid	Create a new pricing grid below the current one
Export grids to Excel Import Excel grids	Use "Export grids to Excel" to download a template import file (will include any item already added). This file will be filled in offline, and then will be imported back by clicking "Import Excel grids".
Actions / Grid settings	Edit the settings of an existing grid Grid settings include: ▪ Short label (required) ▪ Full label ▪ Display order among other pricing grids The full label will be used as the grid title in the *Items* tab; if missing, the short label will be used instead.
Actions / Duplicate this grid	Create a new grid based on the current grid with all the same columns, items, the grid name and the display order incremented by 1.
Actions / Delete this grid	Remove the pricing grid

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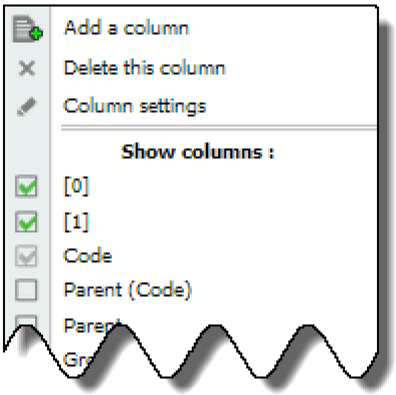
Defining the Columns of a Pricing Grid

A number of different functions allow for defining the columns in a pricing grid. Right click on the header of the pricing grid to access those functions.

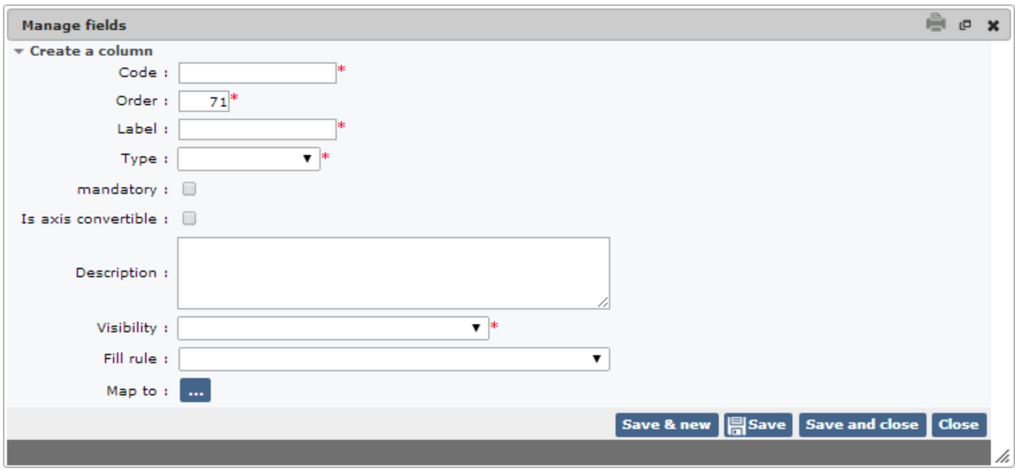


In the menu that pops up, the following actions can be taken relating to columns:

- Create a column, see page 81
- Column Settings, see page 82
- Show/Hide/Move a Column, see page 85
- Remove a Column, see page 85

Creating a Column

1. Select *Add a column.* A *Manage Field* screen pops up.



2. Fill in the fields referring to their definitions on page 82.
3. **Save and Close** to return to the Pricing Grid and see the newly added column. Click **Save and New** to clear the screen and add a new column.

Setting Column Properties

Where columns are editable, choose the *Column Settings* option to adjust the properties of the column.

Properties defined here apply to all items on this Pricing Grid.

These properties are:

Type	***Property***	***Description***
All	Code	A unique identifier for the column (can be used to tag content in a MS Excel template if the named fields functionality refers to the code)
All	Order	Order defining the sorting of the columns
All	Label	Header title of the column
All	Type	Field type, including: ▪ calculated ▪ check box ▪ date ▪ drop down list ▪ decimal ▪ comment ▪ attachment ▪ RFx Form ▪ Monetary amount ▪ radio button ▪ selector ▪ text ▪ yes/no field The selected type determines which properties are available.
All	Mandatory	Enable to render column input mandatory Un-filled mandatory columns will prevent proposal submission, not data saving. Caution: This property applies to all rows of all grids of the RFP that include this column.
All	Is axis convertible	Grid columns will be displayed in the Price Comparison table, in the *Analyze RFP answers* step. Enable this option if you want to be able to select this column as an analysis axis in the table.
All	Description	Free text describing the field This description is available as a tooltip in the column header wherever the grid is displayed, on the Buyer's side and on the Supplier's side (price grid input by the supplier, review of proposals by the buyer, and price synthesis).
All	Visibility	Choose a visibility rule that will specify: ▪ whether the column relates to RFP requirements (RFP) or to supplier proposals (Supplier response) ▪ whether the column is hidden or visible to the supplier and whether he can input data Examples of each option are shown below: ▪ RFP field (visible to supplier) - for example: Qty, Request date

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		▪ RFP field (hidden from supplier) - for example: reference price, internal comments ▪ Supplier response calc field (visible) - for example: the calculated total price based on the supplier's input of unit price * Qty ▪ Supplier response calc field (hidden) - for example: the calculated total savings based on the target price - supplier's price ▪ Supplier response field - for example: their unit price that is being proposed
All	Fill Rule	Defines how sub-items are related to items ▪ Fill sub-items and main item ▪ Fill main item only ▪ Fill sub-items only ▪ Fill sub-items and aggregate sub-item values on main item. This option is associated to a drop-down list where you can select the type of aggregation (Sum, Max. value, Min. value, Average, None)
All	Map to	Links a column to data in an object and field selected (from requisition lines, contract terms, catalog items, etc.)
When the below Types are chosen: checkbox, dropdown, radio button, or yes/no	Possible Values	Allows the buyer to set the list of values that the suppliers will select from in filling out the form/grid. Fill in and Save to show more blank fields to add more choices.
When the below Types are chosen: decimal, monetary amount, calculated	This column contains total value	Used to specify the final column to be used in comparing responses. This property must be assigned to a colum (and only one) so that you can: ▪ Designate the awardee for proposal lines on the *Analyze RFP reponses* step. ▪ Designate the starting price for a future reverse auction step.
Selector	Is item currency	Allows you to make the currency selectable by the supplier at item level (the proposal can thus be multi-currency) To work properly, this option requires that the following properties be set on the column: ▪ Type = Selector ▪ Selector = RFx currencies ▪ Visibility = Supplier Response field ▪ Is item currency = enabled ▪ Fill rule = Fill in main item only
when the below Types are chosen: decimal, monetary amount, calculated	Size	Size of the field in number of characters
when the below Types are chosen: decimal, monetary amount, calculated	Scale	Number of decimals
when the Type = "calculated"	Formula	Apply a calculation using the defined fields. The typical example is the total price field which multiplies the quantity by the unit price. In the formula, each column noted is referred to by their Code. The syntax used to write calculations is defined by the Property DataColumn.Expression of the .Net Framework 4 from Microsoft.

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More details are available at:

http://msdn.microsoft.com/fr-fr/library/system.data.datacolumn.expression.aspx

For our context, the most used terms are:

Math Operators:

- + (addition)
- - (subtraction)
- * (multiplication)
- / (division)
- % (modulo)

And the following functions:

- **ISNULL**

Description	Checks an expression and either returns the checked expression or a replacement value.
Syntax	ISNULL(*expression, replacementvalue*)
Arguments	*expression* -- The expression to check. *replacementvalue* -- If expression is , replacementvalue is returned.
Example	ISNULL(QTY,1) * UNIT_PRICE Using this formula in the *Amount* column returns the total price for the line item by multiplying the unit price by the quantity; if the quantity is not filled in (null), then the unit price is multiplied by 1. You can edit this formula and apply it to other fields. For instance, you could use it to create a Discount column or a Transportation Fee column that would alter the total price, etc.

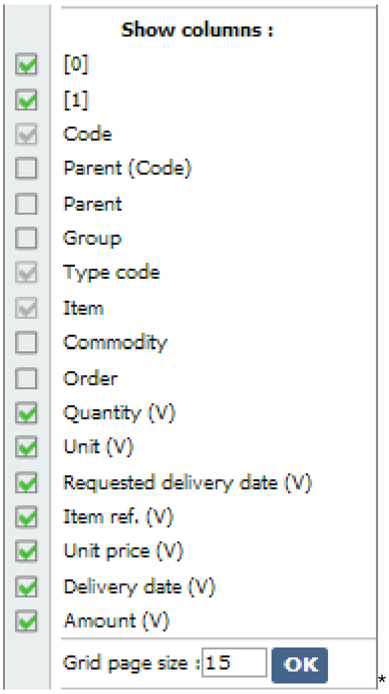
- **IIF**

Description	Gets one of two values depending on the result of a logical expression.
Syntax	IIF(*expr*, *truepart*, *falsepart*)
Arguments	*expr* -- The expression to evaluate. *truepart* -- The value to return if the expression is true. *falsepart* -- The value to return if the expression is false.
Example	IIF(total>1000, 'expensive', 'dear')

- **CONVERT**

Description	Converts particular expression to a specified .NET Framework Type.
Syntax	Convert(expression, type)
Arguments	*expression* -- The expression to convert. *type* -- The .NET Framework type to which the value will be converted.
Example	convert(ISNULL([TAX],'0'),System.Decimal) where TAX is a column that contains a tax

		rate selector (possibles values '5.5', '10' .... text strings that can be converted into numbers)
when the Type = Comment or Text	Size	Maximum size of field in number of characters
when the Type = Selector	Selector	Choice of which pre-defined drop down list from the application database may be used.



Showing/Hiding Columns

In the contextual menu that can be accessed by right-clicking the column headers, all the columns for the pricing grid are shown. Where they are checked, they are visible on the pricing grid. When they are not checked, they are hidden. Those in grey are locked from the Show/Hide functionality.

Note that choices here affect only the display. Hiding a column does not remove it from the grid. To remove a column from the grid, you need to delete it (use the *Delete this column* functionality in the same menu).

Reordering the Columns

To reorder the columns, hover over the column's checkbox in the contextual menu. When your mouse cursor turns into a cross, hold down the left-click and drag the column to a new position in the list. The new column order will be mirrored in the grid.

Deleting a Column

Right-click the column you want to delete and select *Delete this column* from the contextual menu.

A column containing data already cannot be deleted.

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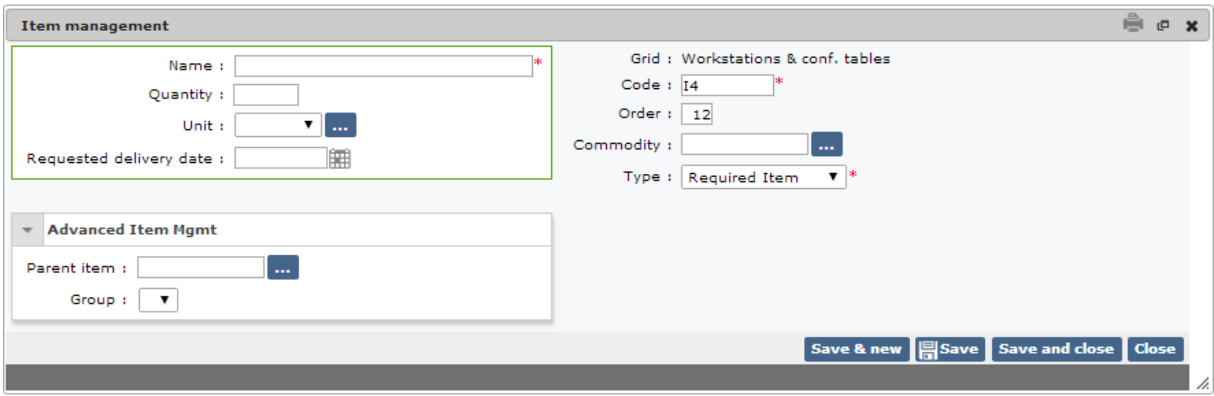
Entering Items Into a Pricing Grid

Creating a New Item in the Pricing Grid

To create an item, click on the **Actions** button and select the option *Add an item*. The item form pops up.



The form for creating items allows the user to fill in all the fields from the grid that need to be entered on the buyer side.

Each item should be identified by a unique code (see *Management of unique identifiers for items in the pricing grids*, page 89), a name and a type.

Alternative Ways to Create Items

Right clicking on an existing item brings up another menu offering the following alternative ways to create items:

Function	***Description***
Insert an item	Creates a new item and inserts it above the item you right-clicked
Duplicate this item	Copies the item you right-clicked and inserts the copied item right below it

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Item Groups and Sub-Items

An item can be attached to an item group and can be broken down into sub items:

- Item groups are created and selected in the item creation form.

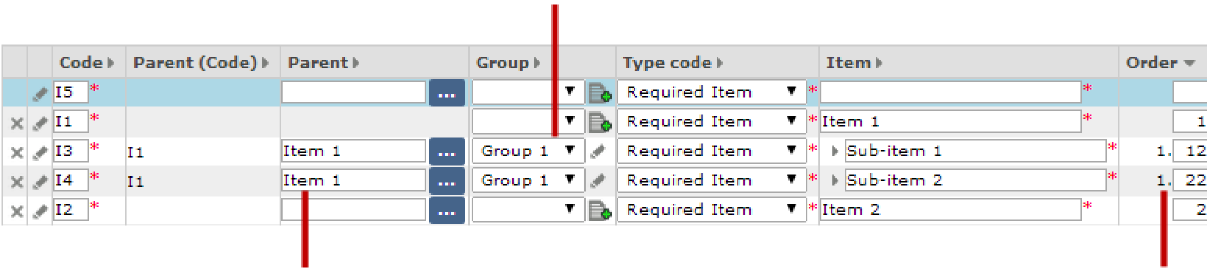
Groupe :	Select group
	Create new group
	Edit selected group

- Sub-items are created either by selecting a parent item for an existing item, or by right-clicking the parent item, and then selecting *Create a sub-item*.

Groups, items and sub-items are displayed as follows:

You can create groups from any item.

You can then attach the item to its group.



An item will become a sub-item as soon as it is attached to a parent item.

The order number of a sub-item is a sub-number of its parent item. If the parent item's number is 1, then sub-items will be numbered 1.x.

Modifying and Deleting Items

The icons associated to with each row in the grid allow you to perform the following actions:

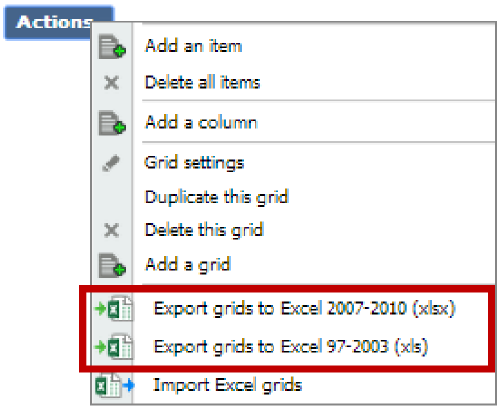
Icon	*Description*
✕	Delete the item The **Actions** button gives you access to the option to *Delete all items.*
	Edit the item Allows you to modify the items' properties.

Importing Items From Excel Into a Pricing Grid

Downloading the Grid Columns in Excel and Entering Items Offline

You need to define the grid columns before this action (see page 81).

1. Click on **Actions**, and then select either one of the 2 options *Export grid using Excel,* depending the MS Excel® version you're using.



   This can take a few minutes.

   The file will be downloaded to your computer following the procedure of the web browser you're using.

2. Save the file to the location of your choice, then open in MS Excel.

   The Excel document contains several tabs:

   - Instructions: instructions to use the document. Read these instructions carefully.
   - Columns: dictionary of usable columns in the different grids of items.
   - Grids: list of response grids
   - Tabs « response grid »: contains one tab per grid. In the grids, the sections in white or in gray are to be completed by the buyer. These columns will contain the data to be imported.

3. Enter the rows of items in the different grids.
4. Save the file.

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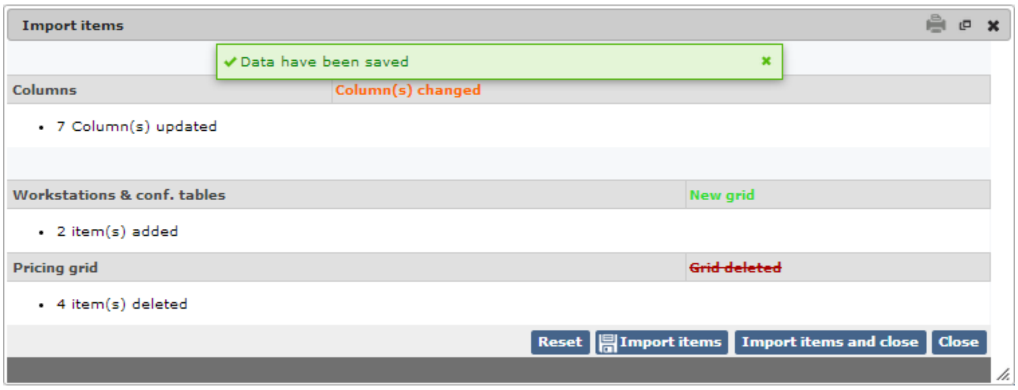
Importing the Items File

1. Click on **Actions**, and then select the option *Import Excel grids*.
   A window *Import items* pops up.
2. Click on **Browse**, select the file to be imported, then click on **Open**.
3. In the window *Import items,* click on **Check import**.
   A preview of the modifications imported is displayed.



4. Click on **Import items and close**.
   The grids from the tab *Items* are updated.

Importing From the Requisition

Refer to *Creating a new sourcing project (RFP) from a selection of catalog items or from a purchase requisition*, page 23

Management of Unique Identifiers for Items in the Pricing Grids

Any item must be uniquely identified by its code within each RFx round. When the RFx includes multiple pricing grids, the same item number cannot appear on more than one grid.

Code unicity checks are run by the system during the creation, modification, and import of items, in order to avoid duplicate item codes.

These checks affect only non-deleted (status 'del') items in the same round, and does not include items created by the supplier.

During the creation/modification of an item, if a duplicate code is found, you will be prevented from saving the file and a warning message will pop up.

During an import, numbers will automatically be appended to duplicate codes to make them unique. After the import is completed, a message gives the summary of imported/ignored lines.

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Advanced Cost Breakdown Analysis

Objectives

When you need a more granular analysis of the suppliers' price structure than is offered in standard price grids, you have the ability to design and implement complex cost breakdown forms in MS Excel® format.

These entirely customizable forms allow you to request suppliers to break down their prices into the cost constituents and with the granularity level that best suit your needs.

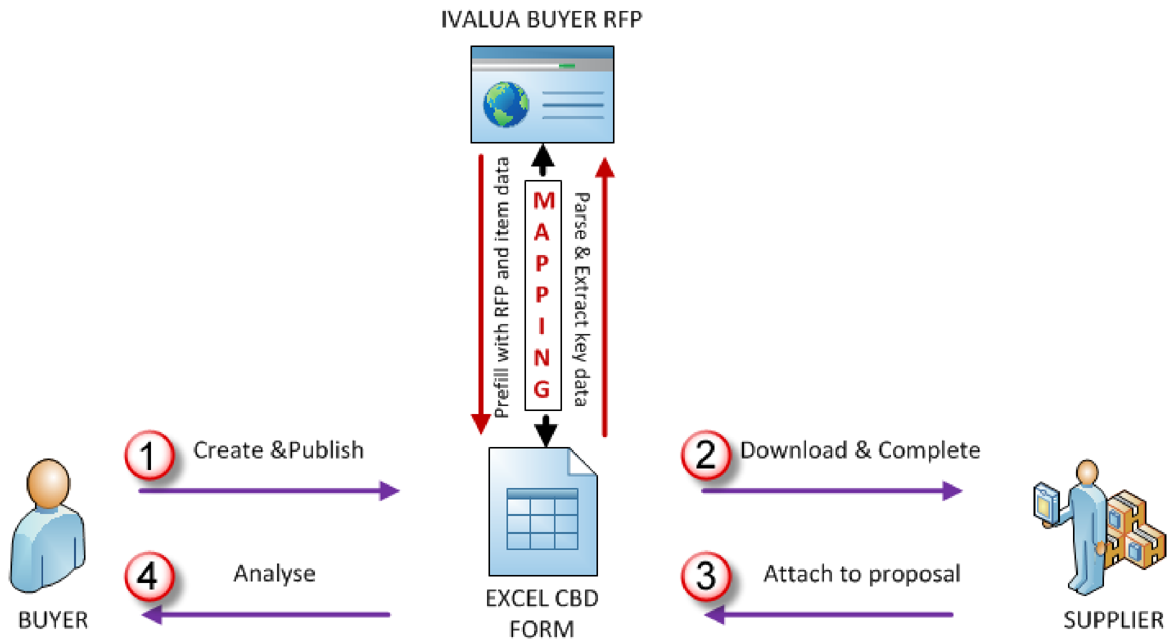
Cost breakdown analysis allows for a more accurate comparison of bids. You may thus:

- Identify the price variation levers and determine the lowest total cost solution
- Craft informed negotiation strategies
- Better understand strengths and weaknesses of your suppliers

Overview of the Process

First, you need to create an MS Excel table that reflects the particular cost structure for the product to be sourced. You will then have to create a mapping between the Excel worksheet and the RFx grid in IVALUA. This mapping will allow the following process to take place:

- When suppliers are invited to bid in an RFx, they will be able to download this form, which will be pre-populated with the appropriate RFx and item data. They will have to complete the form and attach it to the proposal they will submit.
- The buyer, in turn, will be able to review each supplier's offer and associated cost breakdown. Key CBD data will be auto extracted from suppliers' responses to the proposal analysis grid in the RFP, allowing side-by-side comparison.



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The RFx setup process for a CBD approach will include the following steps:

Step	*For detailed instructions on how to perform this step, go to:*
1. Designing the Excel CBD Form	92
2. RFx Setup: Setting up the Response Grid for Form Download and Upload	93
3. RFx Setup: Setting up the Response Grid for Key Data Extraction	94
4. Mapping the Excel CBD Form and the RFx Response Grid	95
5. Attaching the Excel CBD Form to your RFx	97
6. Attaching the Excel Worksheet to a Grid Item and Pre-populating the Form	98

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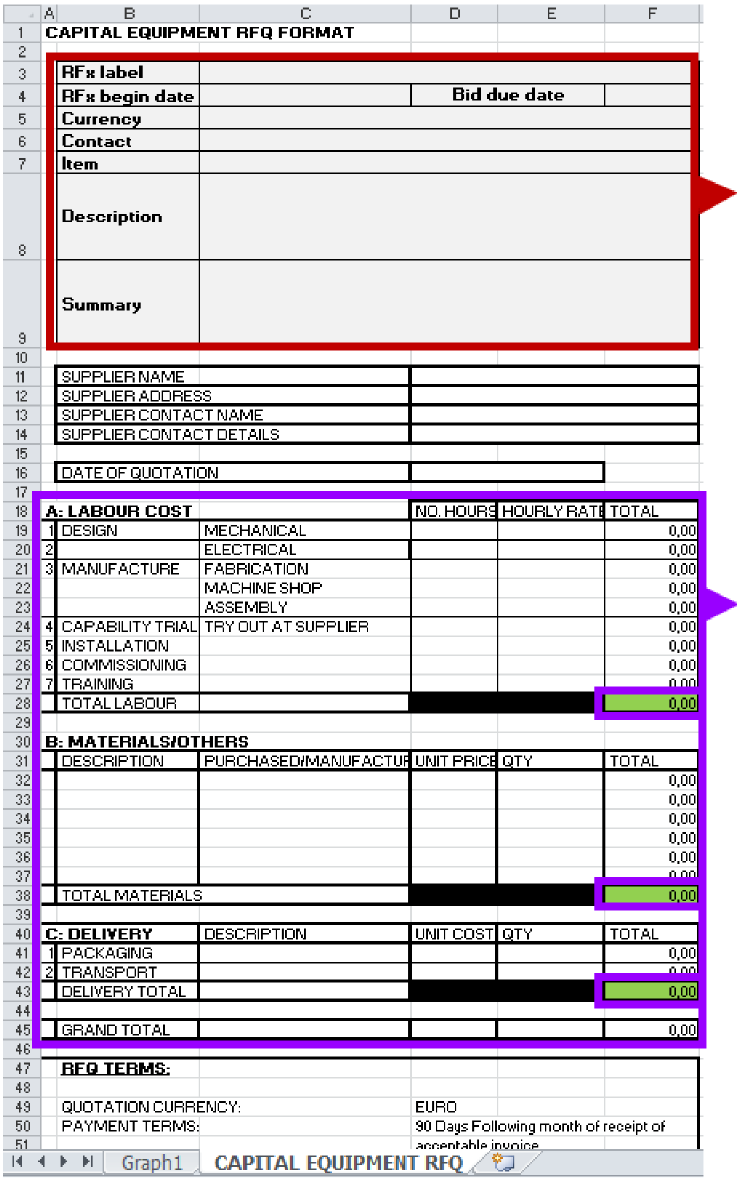
Designing the Excel CBD Form

The CBD form is a normal MS Excel® worksheet that will typically include:



	A	B	C	D	E	F
1	CAPITAL EQUIPMENT RFQ FORMAT					
2						
3		RFx label				
4		RFx begin date		Bid due date		
5		Currency				
6		Contact				
7		Item				
8		Description				
9		Summary				
10						
11		SUPPLIER NAME				
12		SUPPLIER ADDRESS				
13		SUPPLIER CONTACT NAME				
14		SUPPLIER CONTACT DETAILS				
15						
16		DATE OF QUOTATION				
17						
18	A: LABOUR COST			NO. HOURS	HOURLY RATE	TOTAL
19	1	DESIGN	MECHANICAL			0,00
20	2		ELECTRICAL			0,00
21	3	MANUFACTURE	FABRICATION			0,00
22			MACHINE SHOP			0,00
23			ASSEMBLY			0,00
24	4	CAPABILITY TRIAL	TRY OUT AT SUPPLIER			0,00
25	5	INSTALLATION				0,00
26	6	COMMISSIONING				0,00
27	7	TRAINING				0,00
28		TOTAL LABOUR				0,00
29						
30	B: MATERIALS/OTHERS					
31		DESCRIPTION	PURCHASED/MANUFACTUR	UNIT PRICE	QTY	TOTAL
32						0,00
33						0,00
34						0,00
35						0,00
36						0,00
37						0,00
38		TOTAL MATERIALS				0,00
39						
40	C: DELIVERY		DESCRIPTION	UNIT COST	QTY	TOTAL
41	1	PACKAGING				0,00
42	2	TRANSPORT				0,00
43		DELIVERY TOTAL				0,00
44						
45		GRAND TOTAL				0,00
46						
47		RFQ TERMS:				
48						
49		QUOTATION CURRENCY:		EURO		
50		PAYMENT TERMS:		90 Days Following month of receipt of		
51				acceptable invoice		

Graph1 | CAPITAL EQUIPMENT RFQ

A header, which contains input cells that will be auto populated with RFP and item data.

A table, which presents the cost breakdown that you wish to obtain from your suppliers.

Within this table, you will need to determine the key data that will automatically be extracted to the proposal analysis grid for a side-by-side comparison.

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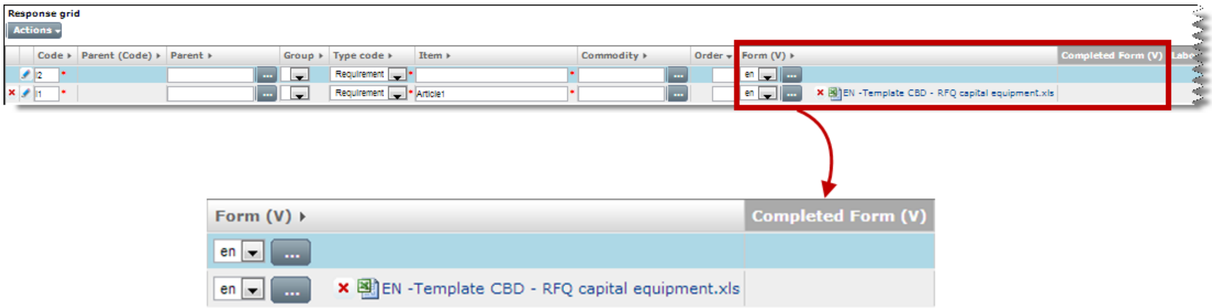
RFx Setup: Setting up the Response Grid for Form Download and Upload

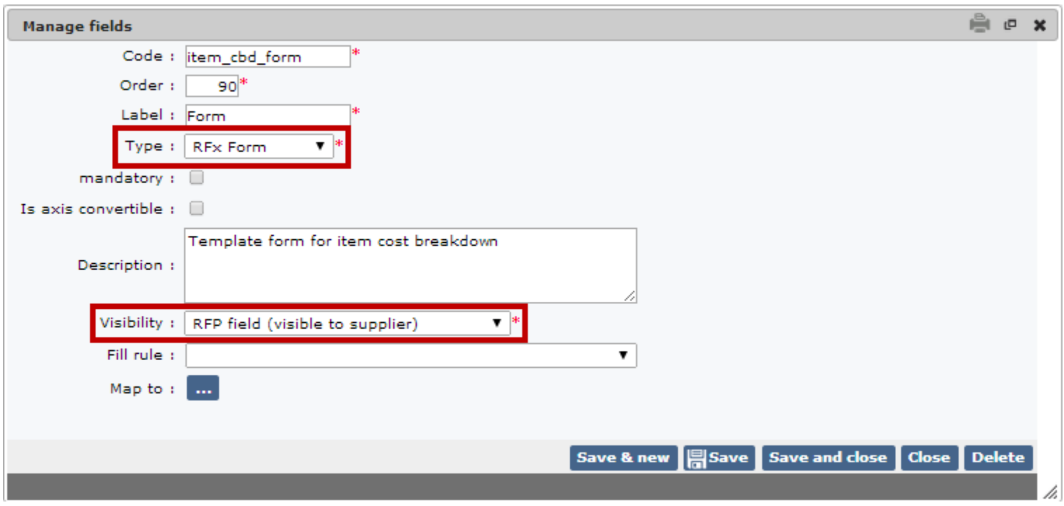
The response grid to your RFP will have to include 2 columns dedicated to handling the Excel form.



- One column will contain the blank form that suppliers will download in order to complete it.
- The other column will be used by suppliers to upload the completed form (and thus attach it to their proposal).

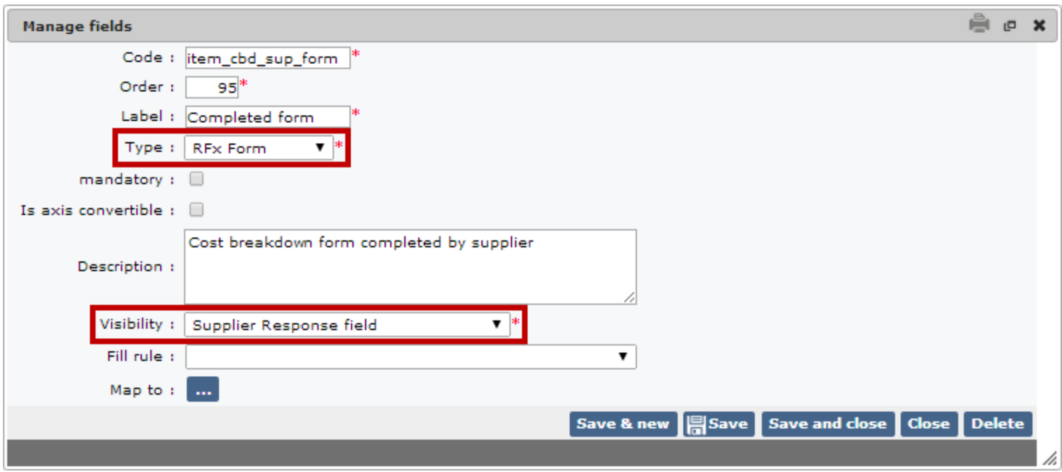
Now let's review the particular settings each of these columns will require in order to behave as we've just described.

Blank Form Column (download column)



The column type should be *RFx Form*, and its visibility should be set to *RFP field (visible to supplier)*.

Completed Form Colum (upload column)



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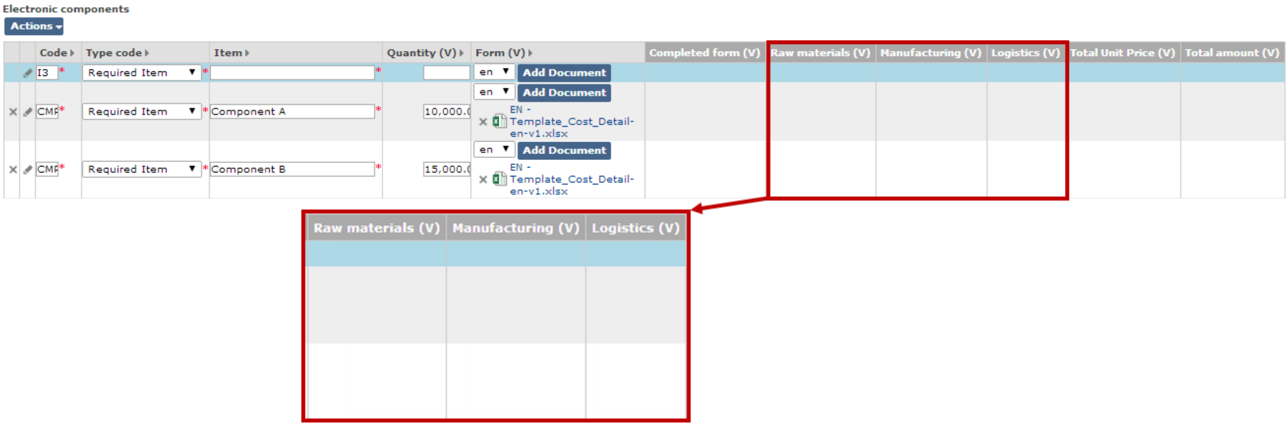
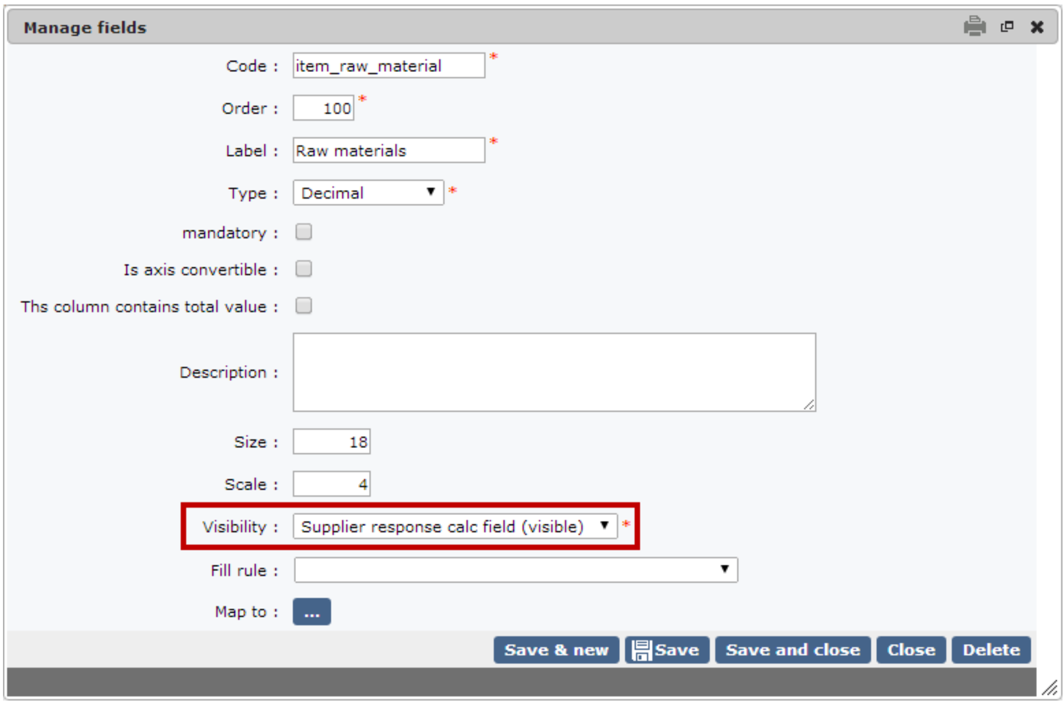
The column type should be *RFx Form*, and its visibility should be set to *Supplier Response Field*.

RFx Setup: Setting up the Response Grid for Key Data Extraction



The response grid will also need to include columns that will collect the key data that will be extracted from the completed CBD form.

The visibility of these columns should be set to *Supplier response calc field (visible)*.



All grid columns are uniquely identified by a code. You need to take note of the codes you give to these columns as these will be used to map the grid columns with key response cells in the CBD form (see *Output Data Mapping*, p. 96). Watch out, codes are case-sensitive.

Mapping the Excel CBD Form and the RFx Response Grid

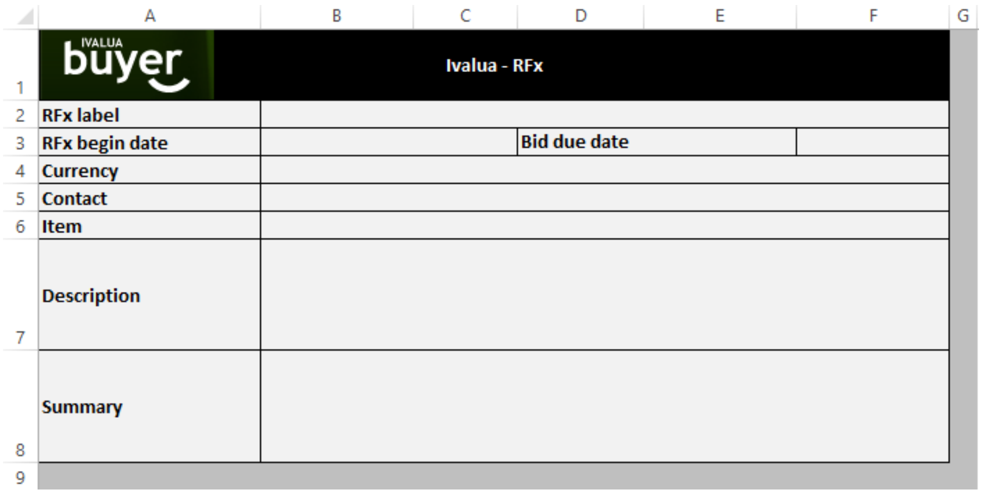
As we've already outlined, there are 2 types of data that you will need to map between the RFx response grid and the Excel form:

- Input data
- Output data

Input Data Mapping

This is the item- and RFx data that will automatically be fed to the Excel CBD form.

RFx data will typically originate from the RFx *Setup* tab, and item data from the *Items* tab.



Click the cell where you want data to be fed.

For instance, to map the cell where you want the RFx label to be auto populated, click the input cell placed to the right of the cell containing the text "RFx label":

On the *Formulas* tab, in the *Defined Names* group, click *Define Name*.

The *New Name* dialog box displays.

In the *Name* box, type "field_input_xxx", where "xxx" stands for the field code name in IVALUA's database.

Here are a few names that you may use for input fields:

RFx Field	***Excel Defined Name***
RFx Label	field_input_rfp_label
Item	field_input_item_label
RFx Begin Date	field_input_rfp_begin_date
Bid Due Date	field_input_rfp_end_date
Contact	field_input_requester_name
Summary	field_input_rfp_summary
Process	field_input_rfp_process

Proceed in the same manner for all the cells you want to be auto populated.

Save your file.

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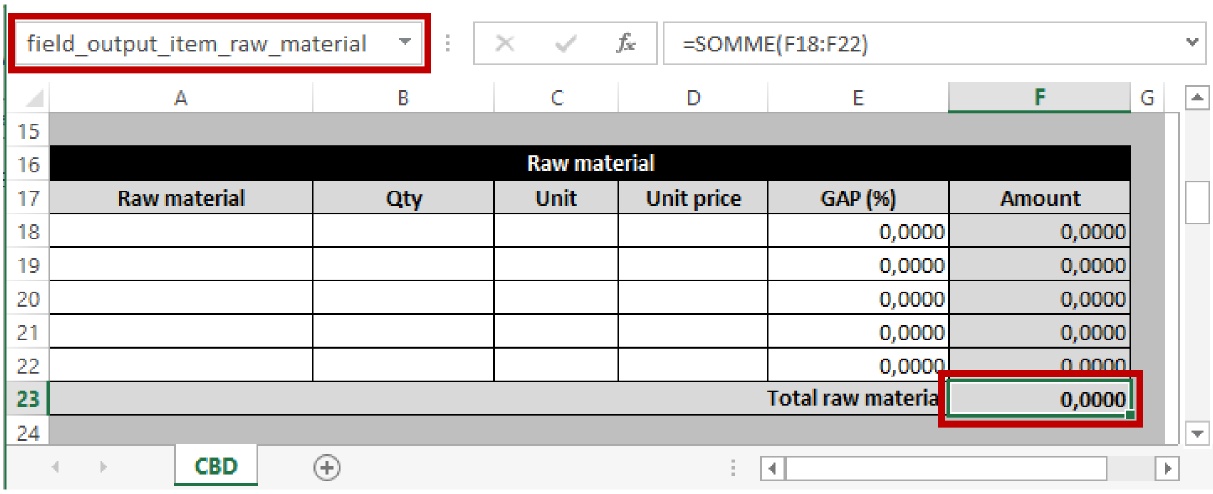
Output Data Mapping

This is the key response data that will be extracted from the Excel CBD form to the RFx grid.

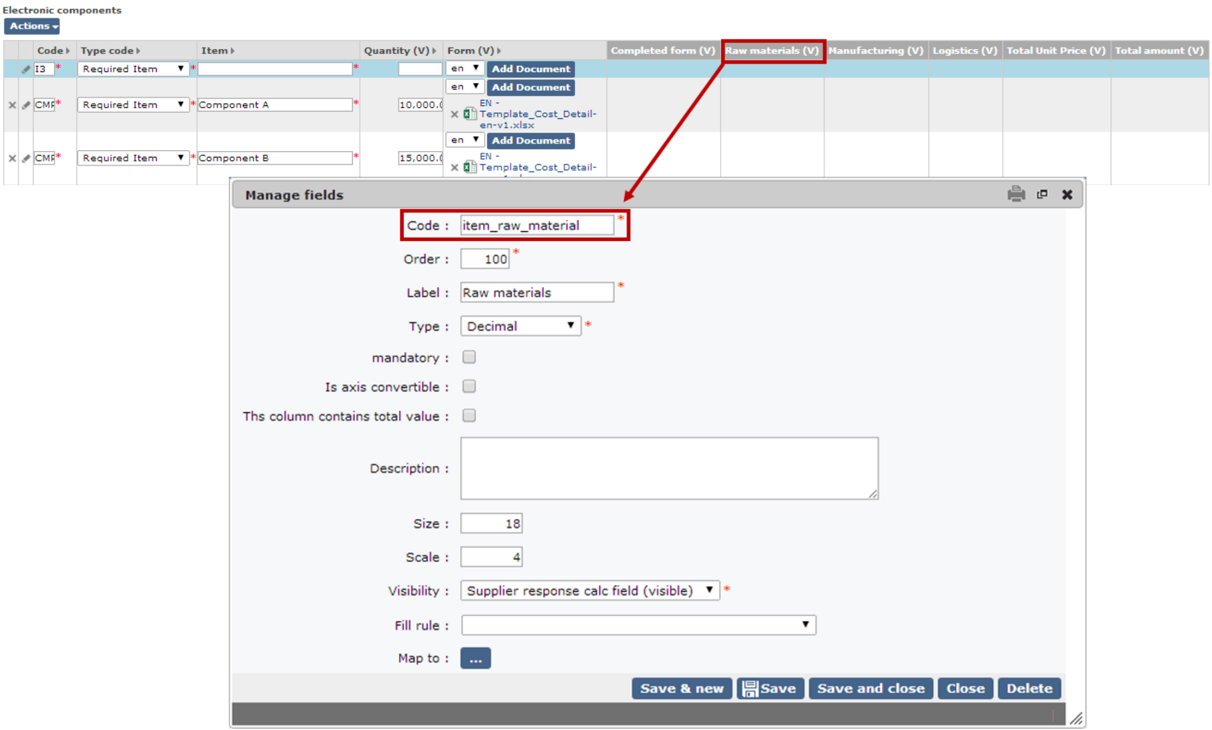
To allow the application to correctly parse these key cells, you will also use Excel's formula names, just like you did for input fields, except this time you will use a different naming convention: "field_output_xxx", where "xxx" stands for the code of the RFx grid column that will receive the data extracted (see *RFx Setup: Setting up the Response Grid for Key Data Extraction*, p. 94).

In the example below, we want to extract the total cost of raw materials.

The cell has been assigned the formula name: "field_output_item_raw_material".



"item_raw_material" is the corresponding column code in the RFx grid.



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Attaching the Excel CBD Form to your RFx

In order for the CBD form to be available to invited suppliers, you have to attach it to your RFx.

This is done in the tab *Attachments to RFx* of the step *Prepare RFP*.

Click the button **Create new document for this RFx**.

The list of available document types displays.

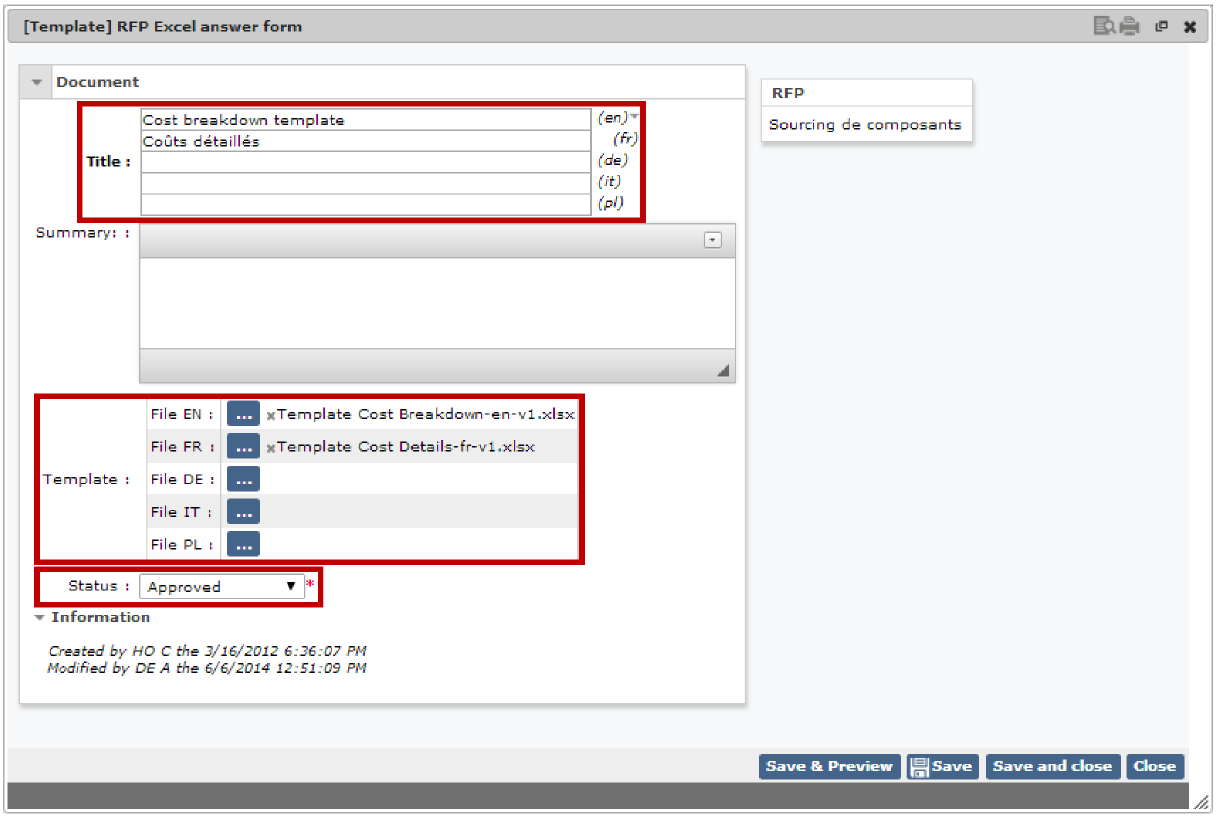
Select the type *RFP Excel Answer Form*.

Give a title to the document.

In the *Template* field, click the *Selector* button ... that corresponds to the language of your Excel form, and select the Excel CBD workbook.

Set the status of your document to *Validated*.

Note: Your document may go through other statuses while being prepared (*Draft*, for instance), but it must be in *Validated* status when you publish the RFx in order to make it accessible to suppliers.



Click **Save and close**.

The document is now listed in the tab *Attachments to RFx*.

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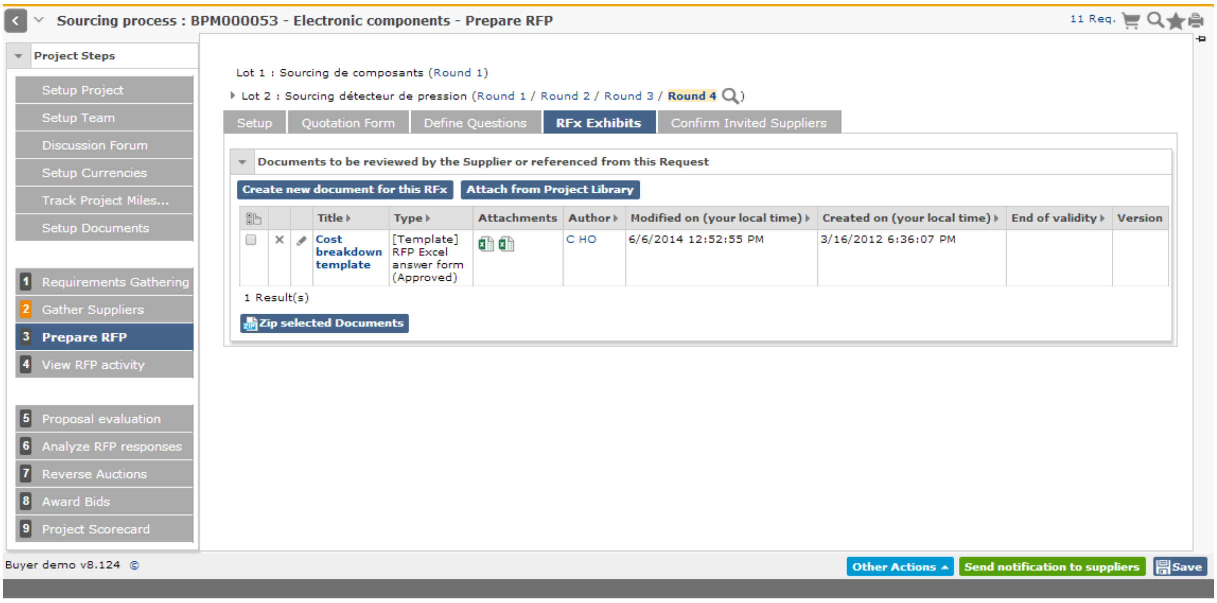
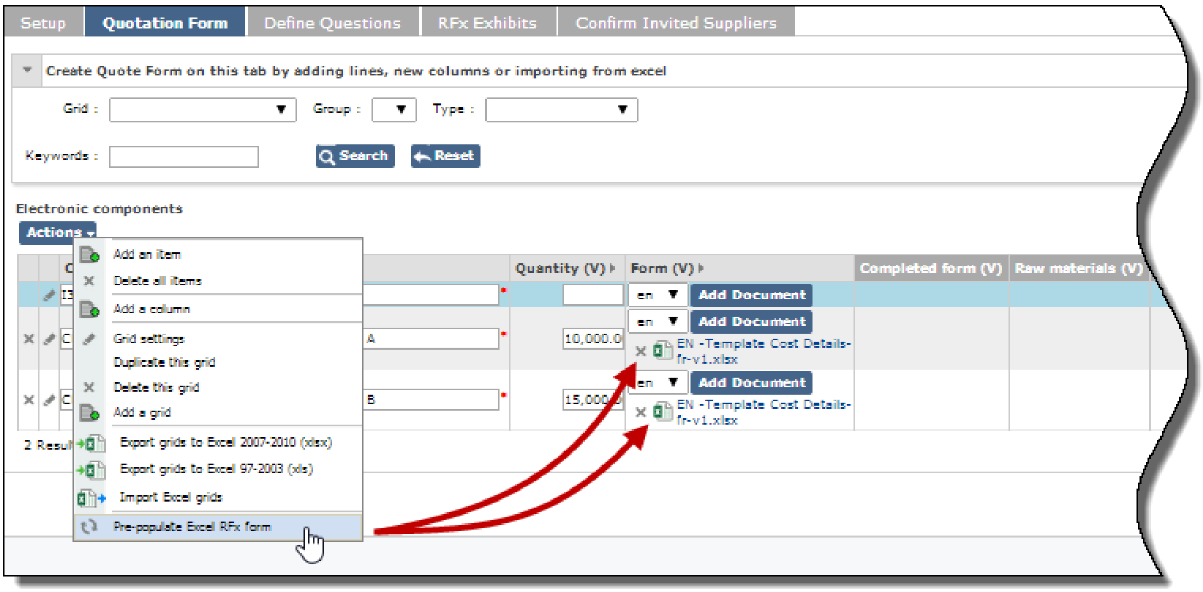


Attaching the Excel Worksheet to a Grid Item and Pre-populating the Form

In the RFx setup step (*Prepare RFP*), display the *Items* tab.



This action has the following effects:

- Attach the Excel CBD file to the grid items
- Pre-populate the form with whatever input data you have mapped

Once pre-populated, the CBD form is ready for use. It will be published with the RFx when you invite suppliers to bid.

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Questionnaire Form / Scoring Form

Use Cases: RFI and RFP Proposal Scoring

The *Questionnaire* tab provides a space for designing, copying, or importing a questionnaire that will be sent to solicited suppliers.

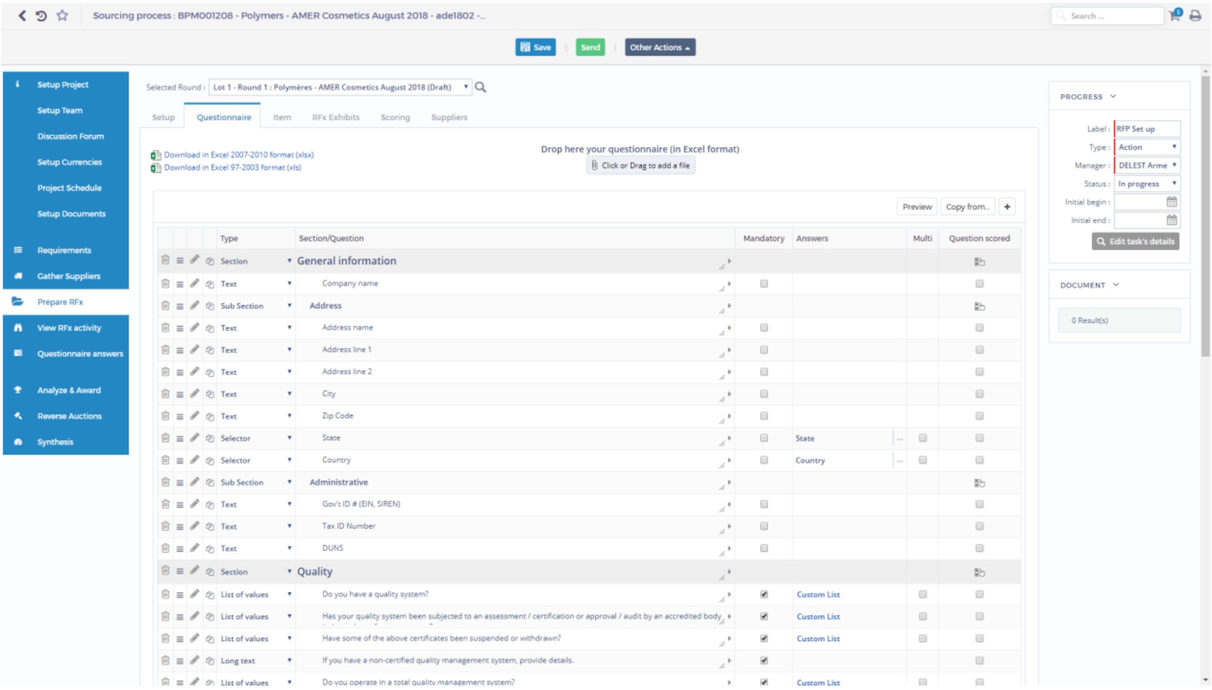
This questionnaire can be used to address two different use cases:

- **Request for Information**: If the RFx type is Request for Information, the questionnaire is the main element of the solicitation and is used to collect information about suppliers, their capabilities and their products/services with a view to preparing an RFP or RFQ, assessing the market, and/or building a database. The RFI questionnaire is created in the *Questionnaire* tab and the *Scoring* tab is not available.
- **RFP Proposal Scoring**: If the RFx type is RFP, the questionnaire is one element of the solicitation, along with the pricing grids and any exhibits. The questionnaire is used to collect information that will count toward the final contract award decision. This is where the *Scoring* tab comes into play: when supplier proposals come in with completed questionnaires, the sourcing team will score supplier answers using the scoring questionnaire defined in the *Scoring* tab. The scoring questionnaire can include an auto-calculated score for pricing, thus producing an overall score that accounts for all aspects of supplier proposals.

Building a Questionnaire Form

Overview

The questionnaire is set up in the **Questionnaire** tab. It can be broken down into sections and sub-sections, if needed.



You can create your questionnaire form in one of two ways:

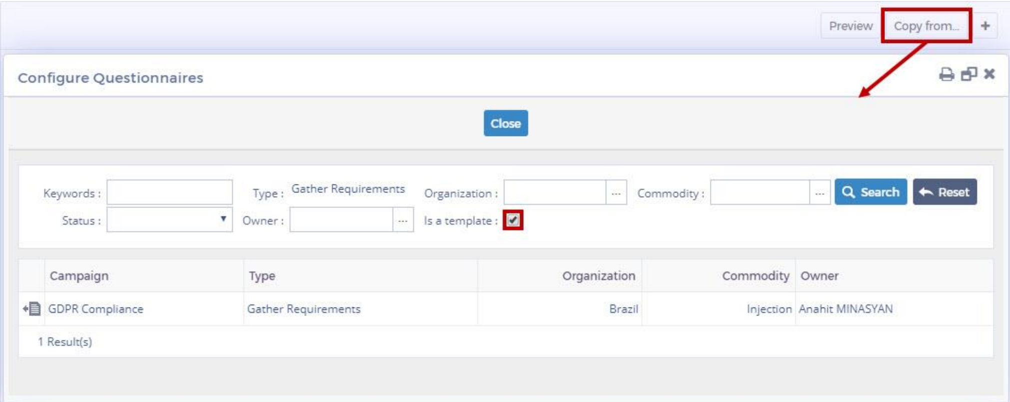
- Using the IVALUA web UI
- Using a Microsoft Excel® file

Building a Questionnaire Form Using the IVALUA Web UI

Copying an Existing Questionnaire or a Template

You can re-use existing questionnaires or use templates configured by authorized users.

1. Click the **Copy from** button in the *Questionnaire* tab.
   The pop-up window displays available templates. To display the questionnaires created in other RFx, deselect the **Is a template** filter and click **Search**.



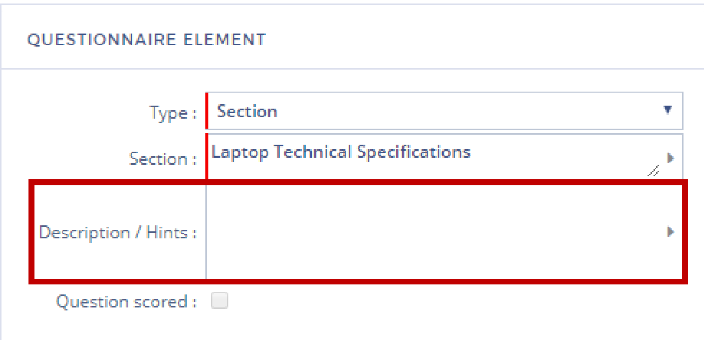
2. Select the desired questionnaire. The questions are added to your current questionnaire form.

You can edit the copied questionnaire to adapt it to your current context. Possible modifications include adding or removing sections and questions and setting up conditional behaviors.

Adding Sections and Sub-sections

1. Click the **Plus Sign** icon + in the *Questionnaire* tab. A new row is added to the question grid.

2. Select whether you want to create a section or sub-section using the **Type** field.
3. Enter the section/sub-section title in the **Section/Question** column.
4. Click the **Save** button in the action bar.
5. To add clarification or guidance instructions on how to answer the questions, use the *Description/Hints* field that you can acess by clicking the *Edit* icon next to the desired section or sub-section.



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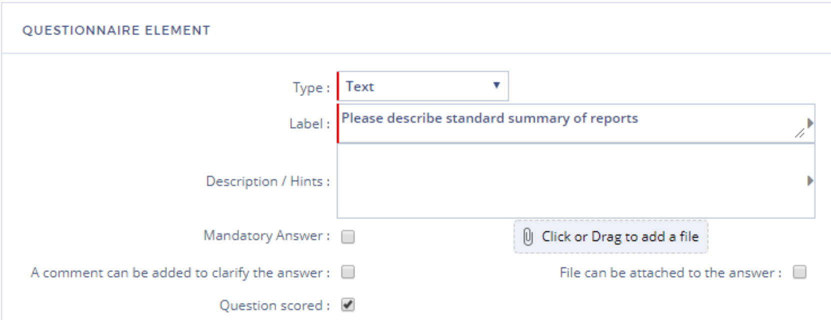
Adding Questions

1. Click the **Plus Sign** icon .
2. Select the question format using the *Type* column.
3. Fill out the question statement in the *Section/Question* column.
4. To indicate that respondents are required to answer the question, select the *Mandatory* checkbox.
5. Save. More settings become available for selector and multiple-choice questions (List of values), namely the *Answers* and *Multi* columns.

6. To allow more than one answer, select the *Multi* checkbox.
7. Set up additional settings. To do so, in the questionnaire grid, click the *Edit* icon next to the desired question. The settings pop-up window opens:



- Use the *Description/Hints* field to add a comment to your question.
- Use the file upload area if you wish to supplement your question statement with additional information in a separate file. The attached file will be available to respondents.
- Select the *A comment can be added to clarify the answer* or the *File can be attached to the answer* option if you wish to allow respondents to add a comment or a file to their answer.

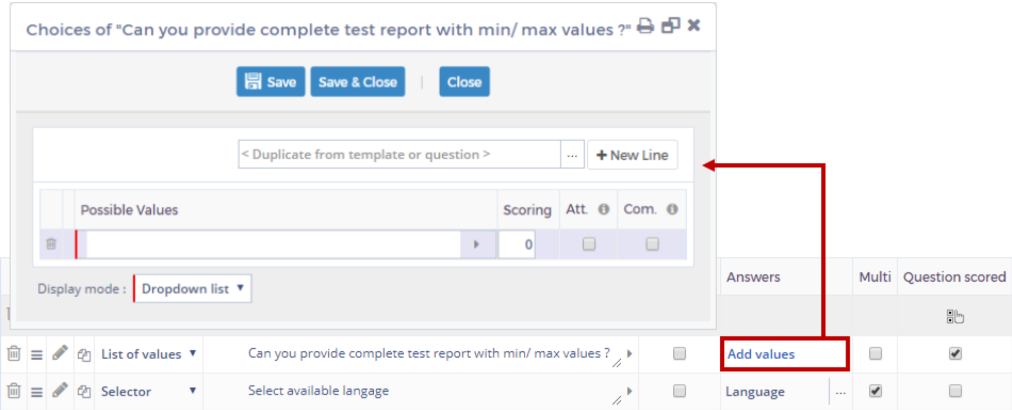
Some question types require additional setup. This is the case for the *List of values* type (➔p.102) and the *Selector* type (➔p.102).

For information on how to include a question into the *Scoring* questionnaire, see page 105.

Setting Up a Multiple-Choice Question

For a multiple-choice question, you need to define the answers that respondents will be able to choose from. To do so:

1. Click **Add values** in the *Answers* column. This will display a screen for setting up answer choices.



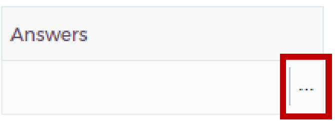
2. Create your answer choice list using one of two methods:
   - Select an existing list from the choice list selector (labeled *Duplicate from template or question*): this selector allows you to copy a choice list from another question in the current questionnaire or from a template, or else
   - Enter each answer choice in the *Possible Values* column (using the **New line** button to add new rows).
3. For each answer choice, define whether an attachment or a comment is required from the respondent by using the *Att.* (attachment required) or *Com*. (comment required) checkboxes.
4. Indicate how you want possible answers to be displayed by selecting a format in the *Display Mode* drop-down list.
5. Save & close.

Setting Up a Selector Type of Question

You use a selector when you want respondents to choose their answer from a specific table of the database. For instance, if you want your suppliers to list the commodities they supply, it'll be more efficient for both parties to have suppliers select these from the commodity selector than letting them provide a commodity list in their own words.

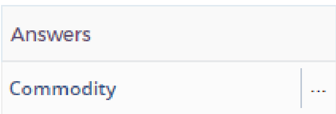
When using a selector, you need to specify which selector you are going to use.

1. Click the *Browse* button  in the *Answers* column.



   This will display the list of available selectors.

2. Click the *Select* icon  of the desired selector.
   The name of the chosen selector is now displayed in the *Answers* column.



3. Save.

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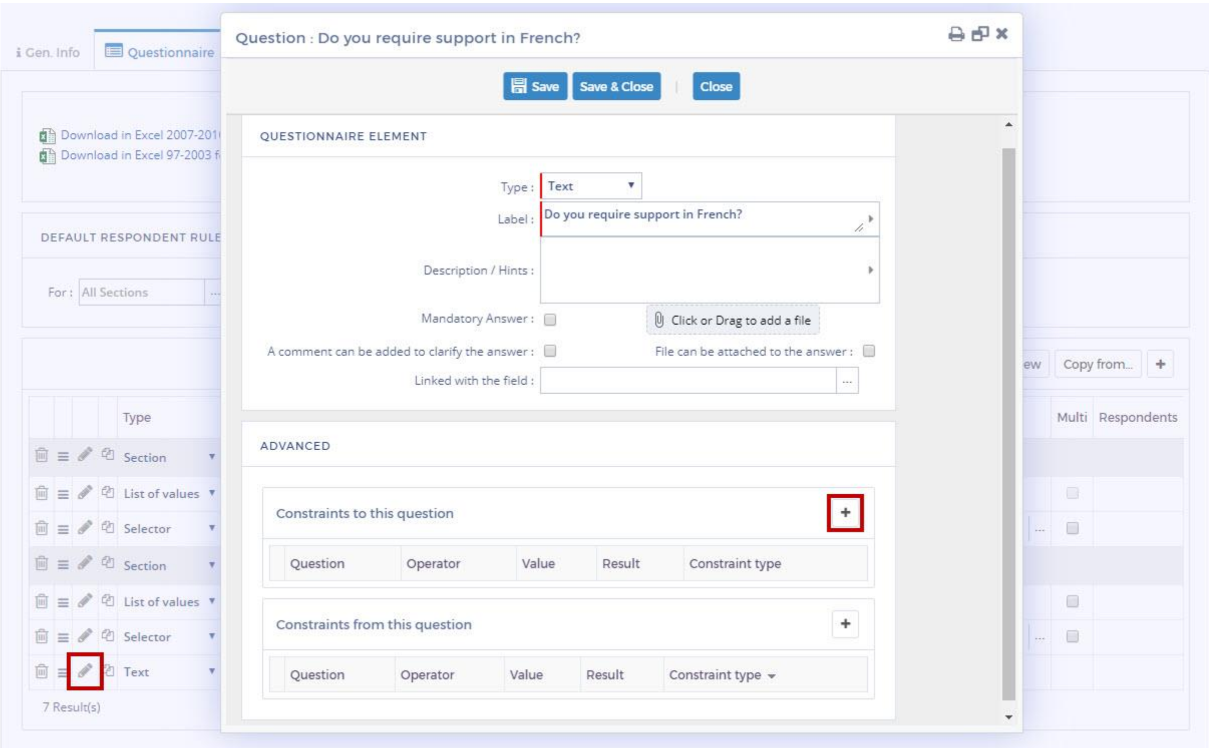
Setting Up Conditional Behaviors

Information Collection questionnaires allow you to set up conditional behaviors based on respondent's answers.

Conditional behaviors always involve two questions: **the question whose response is being evaluated** and **the question that will be affected** if the condition is met.

You can set up the desired conditional behavior from either of the two questions involved. To do so, open the desired question settings by clicking the *Edit* icon, go to the *Advanced* section and click the **Plus Sign** icon in *Constraints to this question* or *Constraints from this question* section:

- **Constraint TO this question:** The current question is the affected question, in other words, the question that will show the result of the condition being met.
- **Constraint FROM this question:** The current question is the question whose response will be evaluated to induce a result.



Possible conditional behaviors (*Constraint type*) include the ability to skip or display questions and the ability to set a question, a comment, or a file attachment as required, all based on respondents' answers.

Let's illustrate this with a simple example. Let's imagine you want to ask your suppliers whether they provide a manual and, if so, to specify the available languages for the manual:

- Q6 – Do you provide manuals?
- Q7 – Select the available languages.

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You want to display Q7 only if the answer to Q6 is YES.

If you set up the conditional behavior in Q6, you will create a FROM constraint like so:

CONDITION RESULT

If you set up the conditional behavior in Q7, you will create a TO constraint like so:

CONDITION RESULT

Whichever way you choose to set it up, the constraint is mirrored in the other question involved.

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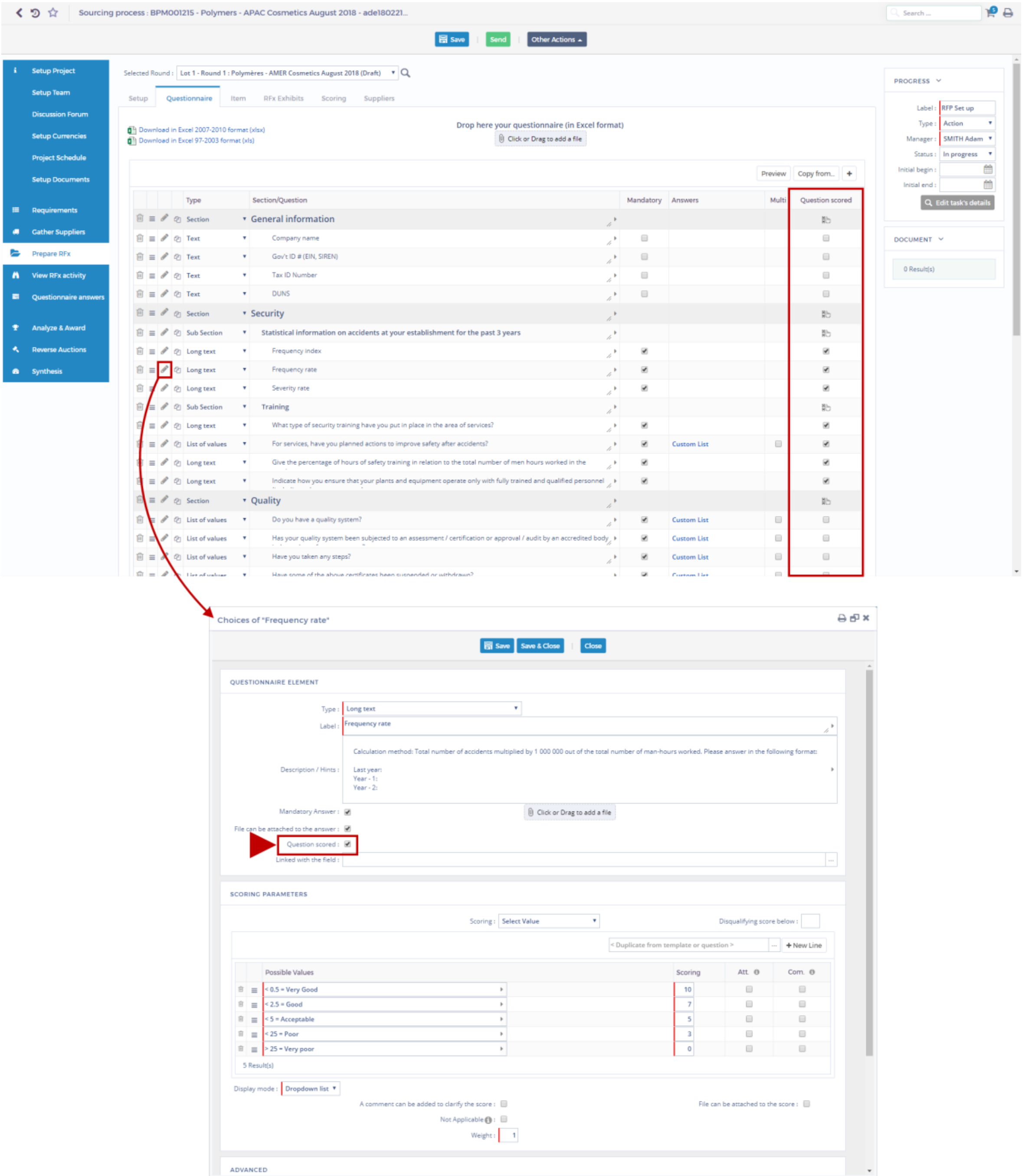
<u>Defining the Questionnaire Items to Be Scored</u>

If you're creating the questionnaire as part of an RFP proposal evaluation process, you must indicate which parts of the questionnaire will be subject to scoring.

By default, all questions and sections from the Questionnaire form are mirrored in the Scoring form. However, this is configurable.

Whether a question from the *Questionnaire* form is mirrored in the *Scoring* form is controlled by the *Question scored* column on the *Questionnaire* tab, as well as the *Question scored* field available on each question/section settings dialog accessible from that same tab.



Using this checkbox, you can decide which questions from your initial questionnaire you want to be scored. Section and sub-section headings are automatically carried over to the *Scoring* form if at least one child question is marked as *Question scored.*

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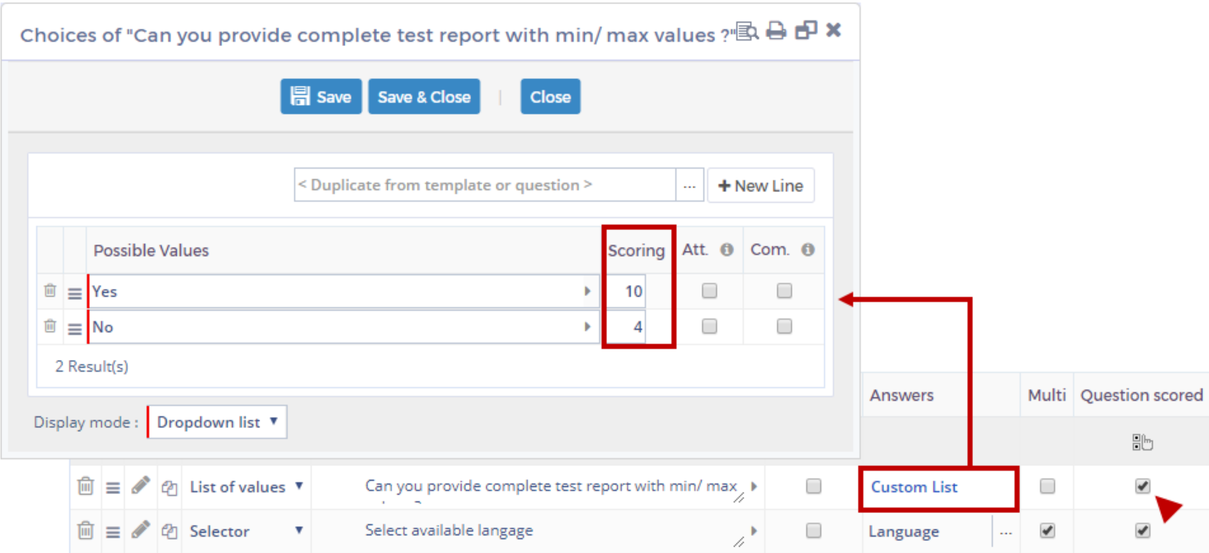
In the *Scoring* tab, you must set up carryover questions for scoring. You will be able to fine-tune your scoring questionnaire by creating specific scoring questions/sections, including an auto-calculated price score.

Configuring Scores for Multiple-Choice Questions to Be Scored

If you mark a *Liste of values* question as *Question scored*, for each answer choice of the question you can set a score suggestion using the **Scoring** column. Score suggestions are meant for supplier proposal evaluators and are displayed in the *Pre calculated score* field of the proposal scoring form.



In the example of the question *Can you provide complete test report with min/max values?*, the score suggested is 10 for the answer YES, and 4 for the answer NO. If the supplier answers NO, the score suggestion displayed to the evaluator will be 4 (see page 136).

Other Operations on Questionnaires

Each row in the questionnaire is associated with a set of icons, which allow you to perform several actions. There are also buttons with additional functionalities related to questionnaires.

UI Control	***Description***
Icon	
	Delete a row
	Move a question up or down (click and drag)
	Edit the settings of a question, sub-section, or section
	Duplicate a question
Button	
Preview	View the questionnaire as it will be displayed to respondents
Promote to template	Save your questionnaire as template. Clicking this button opens a new page where you can submit your questionnaire for approval. Once approved, the questionnaire will be added to the template list.

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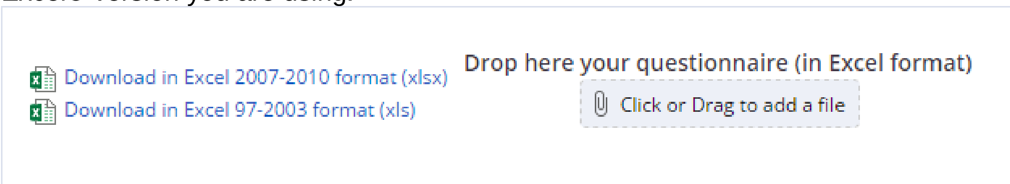
Building a Questionnaire Form Using an Excel File

Editing the questionnaire using Microsoft Excel® involves the following steps:

- Downloading the questionnaire in Microsoft Excel® format
- Editing the questionnaire: you add or edit sections/sub-sections and questions in the downloaded Microsoft Excel® file.
- Importing the questionnaire: you upload the questionnaire in IVALUA.

Downloading the questionnaire in Microsoft Excel® format

1. Display the *Questionnaire* tab.
2. Click the appropriate *Download in Excel Format* option, depending on the Microsoft Excel® version you are using.



   The download process will vary depending on the web browser you are using.
3. Save the file to the desired location, and then open it in Microsoft Excel®.

Adding or Editing Sections or Questions to the Microsoft Excel® File

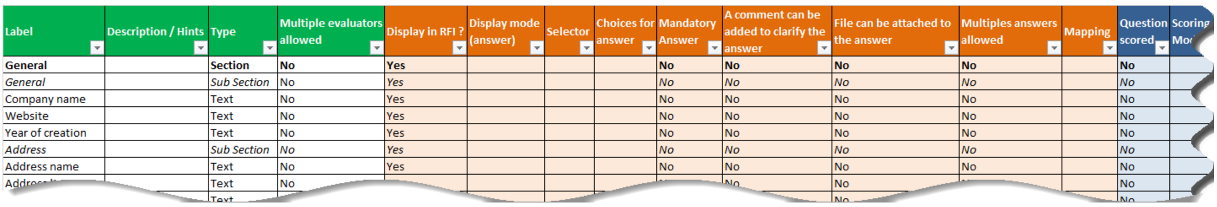
The Microsoft Excel file includes several sheets (tabs):

- An "Instructions" sheet: contains instructions for using the file; we recommend that you peruse this tab.
- A "Questions" sheet: contains all the questionnaire sections/sub-sections and questions.
- A "Constraints" sheet that lists conditional behaviors associated with questions

This section will guide you through the creation and editing of questions and constraints.

Questions

An easy way to figure out how to create the various types of sections, sub-sections, and questions, as well as set related options is to create test questions of each type, and then download the Microsoft Excel file.



Label	Description / Hints	Type	Multiple evaluators allowed	Display in RFI ?	Display mode (answer)	Selector	Choices for answer	Mandatory Answer	A comment can be added to clarify the answer	File can be attached to the answer	Multiples answers allowed	Mapping	Question scored	Scoring Mo
General		**Section**	**No**	**Yes**				**No**	**No**	**No**	**No**		**No**	
General		*Sub Section*	No	*Yes*				*No*	*No*	*No*	*No*		*No*	
Company name		Text	No	Yes				No	No	No	No		No	
Website		Text	No	Yes				No	No	No	No		No	
Year of creation		Text	No	Yes				No	No	No	No		No	
Address		*Sub Section*	*No*	*Yes*				*No*	*No*	*No*	*No*		*No*	
Address name		Text	No	Yes				No	No	No	No		No	
Addre		Text	No						No	No			No	
		Text								No			No	

The table below describes the import file columns and gives instructions on how to fill them out:

Column	Description
Label	Name of the section/sub-section or current question (free text)
Description/Hint	Further explanations or instructions to guide respondents
Type	Section, sub-section or question format type. To access available types, click the cell: an arrow will appear to the right of the cell; click the arrow and select a type from the list:
Multiple evaluators allowed	Indicates whether more than one evaluator can be assigned to the section or sub-section. This option doesn't apply to RFI questionnaires. In fact, you address your questionnaire to suppliers and you want to have one single response from each supplier.
Display in RFI?	(only for the *RFP Proposal Scoring* use case) Possible values: Yes/No “Yes” to include the question in the Information Collection tier of the Proposal Evaluation questionnaire
Display mode (answer)	(only if Question Type = List of values) Indicate how you want your choice list to be displayed. Possible values: Buttons, Dropdown list, Checkbox, Radio buttons, Stars
Selector	(only if Question Type = Selector) Name the selector to be displayed (e.g.: State, Country, Incoterm, etc.)
Choices for answer	(only if Question Type = List of values) List possible answers using the following syntax: Value=X, where “Value” stands for a possible answer and “X” is the number of points assigned to that answer (since multiple choice lists are not scored for RFI questionnaires, assigned points will all be equal to zero) Example: Yes=0 No=0
Mandatory answer	Possible values: Yes/No “Yes” to set the question as required: respondents will not be able to submit the questionnaire unless they have answered all required questions.
A comment can be added to clarify the answer	Possible values: Yes/No “Yes” to add a comment area that will allow the respondent to attach comments to his response, or “No” to discard the comment area.
File can be attached to the answer	Possible values: Yes/No “Yes” to add a file upload area that will allow respondents to attach a file to their response, or else type “No” to discard the file upload area.
Multiple answers allowed	Possible values: Yes/No “Yes” to allow respondents to choose more than one answer to the question

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Column	Description
Mapping	Name of the database column the question is mapped to. This mapping enables you to update IVALUA's supplier repository with data coming directly from suppliers.
Columns specific to **Scoring** questionnaires (*RFP Proposal Scoring* only)	
Question scored	Possible values: Yes/No "Yes" to include the question in the Scoring tier of the Proposal Evaluation questionnaire
Scoring Mode	Scoring question type. Possible values: Select from list (scored multiple choice), Numeric, Price mark
Display Mode (scoring)	Choose among the display variations available for the selected Scoring Mode. If Question Type = Select from list, possible values are: Buttons, Dropdown list, Checkbox, Radio buttons, Stars If Question Type = Numeric, possible values are: Enter value, Stars, Slider
Choices for scoring	(only if Question Type = Select from list) List possible answers using the following syntax: Value=X, where "Value" stands for a possible answer and "X" is the number of points assigned to that answer. Example: Far exceeds expectations=10 Exceeds expectations=7 Meets expectations=5 Below expectations=3 Far Below Expectations=0
Eliminatory score	You can set a minimum score threshold below which scores are considered unsatisfactory and therefore disqualifying. A default eliminatory score may also have been configured for the scoring quesitonnaires, in which case the field will be prepopulated but remains editable.
Not applicable	Possible values: Yes/No "Yes" to give respondents the possibility to choose "Not applicable" as an answer (for instance, in case the question does not apply to the specific context of a respondent).
A comment can be added to clarify the score	Possible values: Yes/No "Yes" to add a comment area that will allow evaluators to comment on the score they assign to the question, or "No" to discard the comment area.
File can be attached to the score	Possible values: Yes/No "Yes" to add a file upload area that will allow evaluators to attach a file to the score, or else type "No" to discard the file upload area.
Weight	Weights allow you to set the relative importance of each section, sub-section, and question in the questionnaire. When importing a scoring questionnaire, weight is ALWAYS mandatory, be it for questions, sections, or sub-sections. Omitting weight values will raise a blocking error on import.

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Constraints

	A	B	C	D	E	F	G
1	Section	Question	Operator	Value	Section Result	Result	Constraint type
2	Manuals	Do you need a manual?	is equal to	YES	Manuals	Select languages	is visible
3	Laptop Technical Specifications	Do you require support?	is equal to	Yes	Laptop Technical Specifications	Select languages	is visible

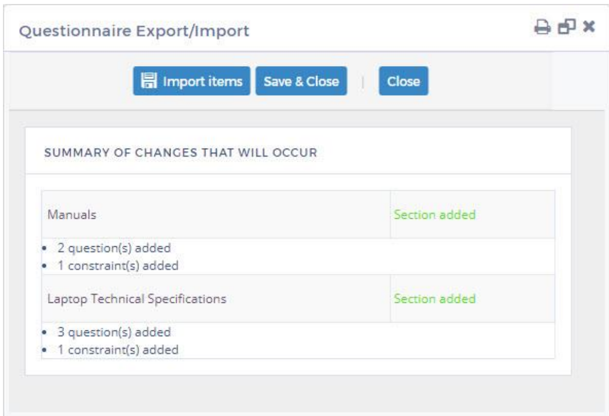
The table below describes the columns from the *Constraints* tab:

Column	*Description*
Section	Name of the section that contains the question to evaluate
Question	Question whose response will be evaluated
Operator	Comparison operator: *Is equal to, Is not equal to, Contains,* etc. Available operators depend on the type of question.
Value	Value the response will be evaluated against
Section Result	Name of the section that contains the question affected
Result	Affected question
Constraint type	Behavior if the condition evaluates to true

Uploading the Microsoft Excel® Questionnaire Back Into IVALUA

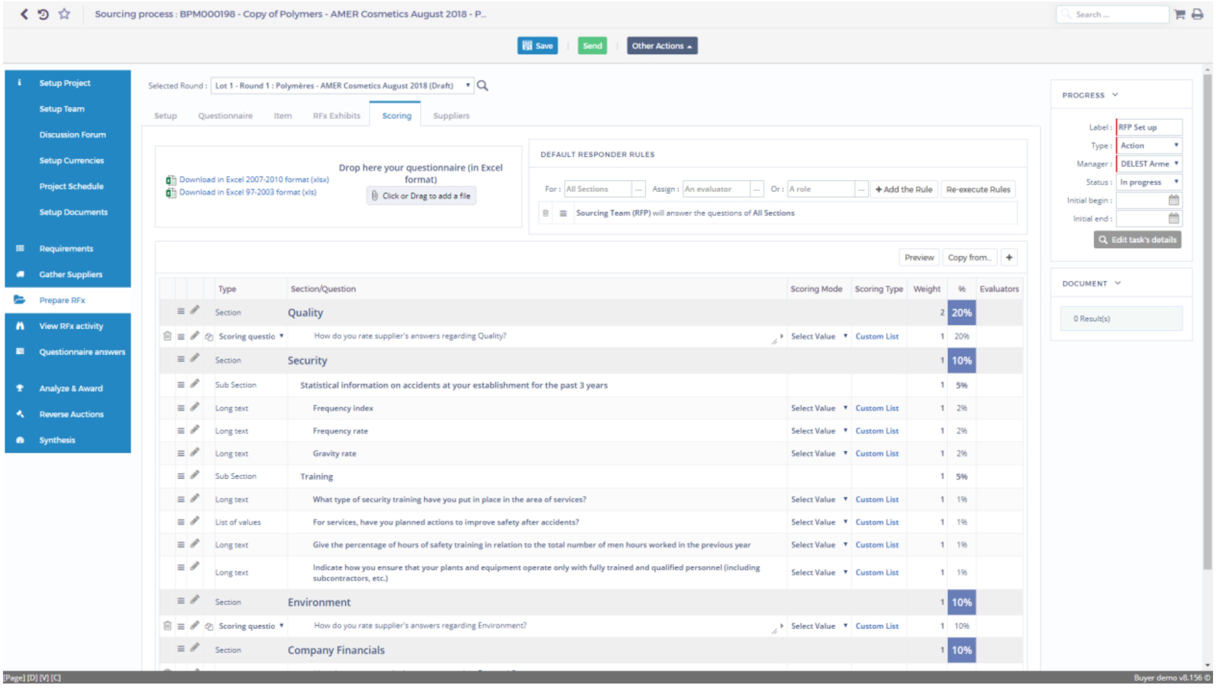
1. Drop the Microsoft Excel® questionnaire file on the file upload area, or click this area and select the file.

The *Questionnaire Export/Import* window will be displayed. This screen presents a list of found errors and gives a summary of the sections, sub-sections and questions that will be imported.



2. Click **Import items** to import the questionnaire. A message will indicate that the import was successful.
3. Click **Close** to go back to the *Questionnaire* tab and view imported questions.

Building a Scoring Form



When you first access the *Scoring* tab, it contains the questions from the *Questionnaire* tab that are marked as *Question scored*, as well as their parent sections and sub-sections.

You can also add new sections and questions directly in the *Scoring* tab. To do so:

1. Click the **Plus Sign** icon . A new row is added to the question grid.
2. In the *Type* column, select the type of item you want to create (section, sub-section, or scoring question).
3. In the *Section/Question* column, enter the section/sub-section heading or the question statement.
4. Save.

Whether carried over from the *Questionnaire* tab or created directly in the *Scoring* tab, all questions must be set up for scoring.

This includes the following operations:

- Setting up the scoring mode (➔p.112)
- Setting up disqualifying scores (➔p.116)
- Configuring additional settings (➔p.118)
- Weighting evaluation criteria (➔p.118)
- Selecting proposal evaluators (➔p.119)

Note

If the questionnaire has been copied from an existing questionnaire or from a termplate, the questions may already be set up for scoring.

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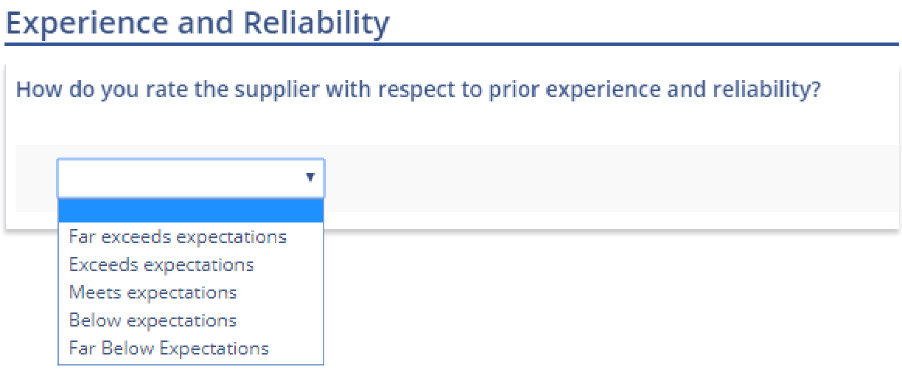
Setting Up the Scoring Mode

Available Scoring Modes

The following scoring modes are available:

Select Value: This scoring mode presents evaluators with a list of statements (each being assigned a number of points). For each supplier answer, evaluators select the statement that best applies, thus determining the score. Answer choices can be displayed in a variety of ways:

- Dropdown list



- Radio buttons

- Checkboxes

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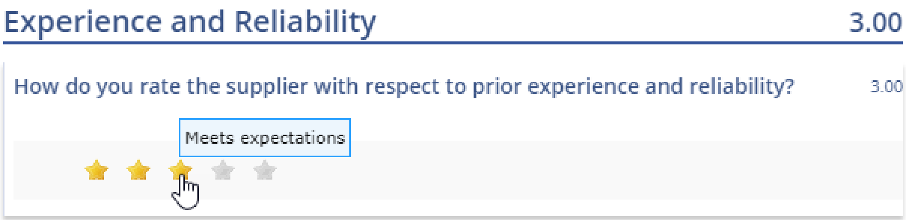
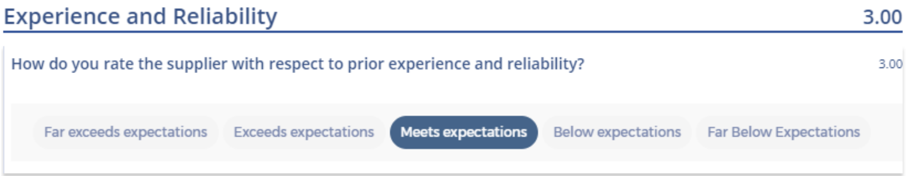
- Stars

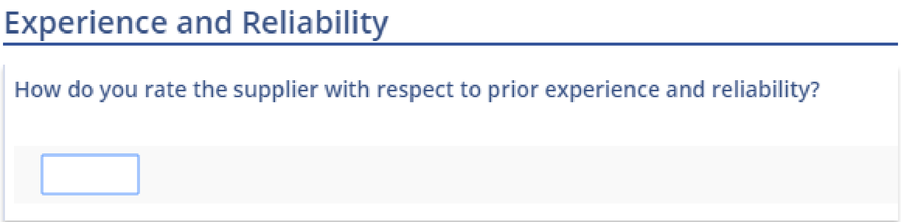


- Buttons

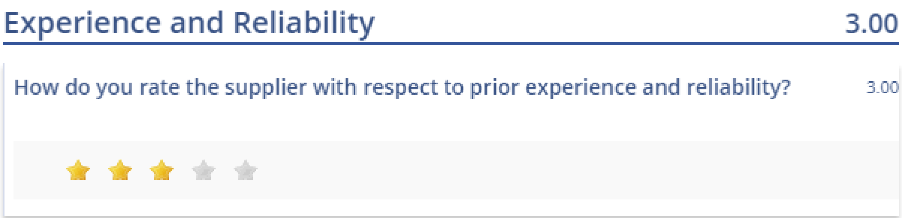


__Numeric__: This scoring mode allows evaluators to rate an answer by entering a score in an entry box, by assigning a number of stars, or by moving a slider.

- Enter value



- Stars



- Slider

__Price Mark__: This scoring mode is available only for questions created directly in the *Scoring* tab. It's an algorithm that automatically produces a score based on the price offer submitted by the supplier in the *Items* tab of the proposal (for more information on *Price Mark*, see p.115). There should only be one Price Mark per questionnaire.

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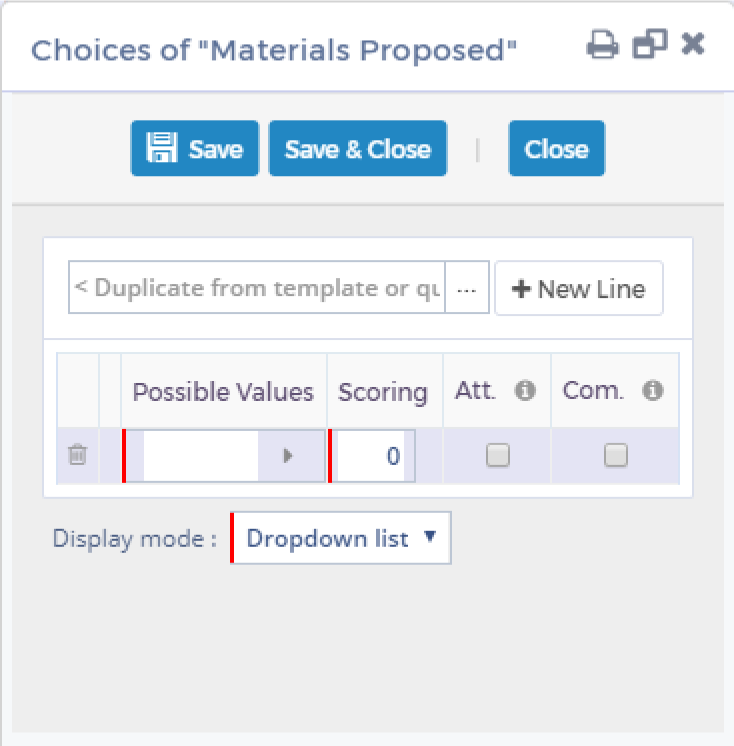
<u>Setting Up a 'Select Value' Question</u>

1. In the *Scoring Mode* column, select *Select Value*.
2. In the *Scoring Type* column, click the *Add Values* link.



3. Create your answer choice list using one of two methods:
   - Select an existing list from the choice list selector (labeled *Duplicate from template or question*): this selector allows you to copy a choice list from another question in the current questionnaire or from a template; or else,
   - Enter each answer choice in the *Possible Values* column (using the **New line** button to add new rows).
4. Scale your choice list by assigning points to each answer in the *Scoring* column.

Possible Values	Scoring
Far exceeds expectations	5
Exceeds expectations	4
Meets expectations	3
Below expectations	2
Far Below Expectations	1

5. For each answer choice, define whether an attachment or a comment is required from the respondent by using the *Att.* (attachment required) or *Com*. (comment required) checkboxes.
6. Indicate how you want answer choices to be displayed by selecting a format in the *Display Mode* drop-down list.
7. Save & close.

Setting Up a 'Numeric' Question

1. In the *Scoring Mode* column, select *Numeric*.
2. In the *Scoring Type* column, select the desired display mode (Enter value, Stars, or Slider).
3. Save.

Setting Up a Price Mark

Price Mark is a question format type which is unique to RFP Proposal Evaluation questionnaires. It is not an actual "question"; rather it's an algorithm that takes the suppliers' price offers and automatically converts them into scores. Price scores can then be combined with other non-cost criteria to arrive at a total score for each supplier, which informs the contract award decision. There should only be one Price Mark per questionnaire.

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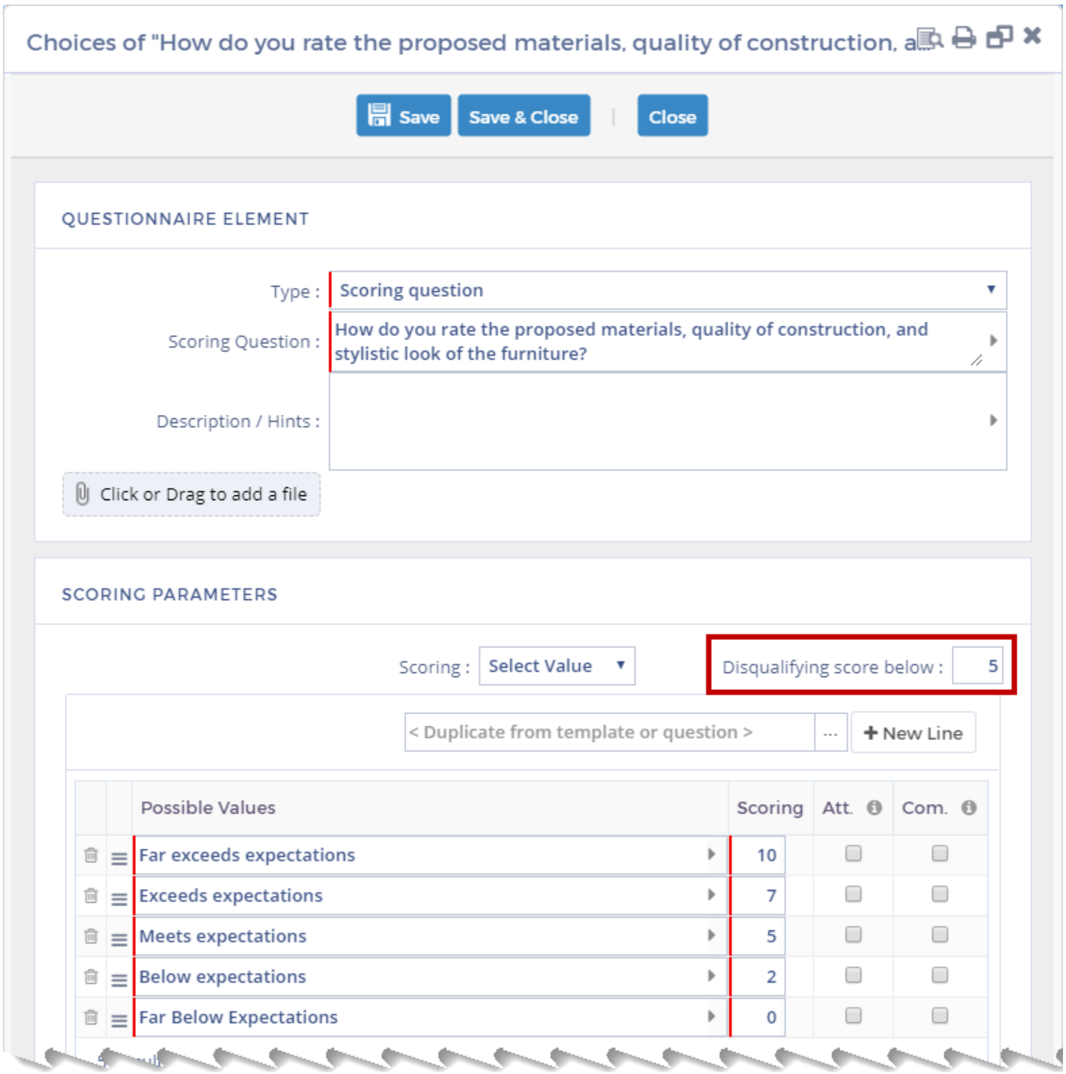
Setting Up Disqualifying Scores

You can use disqualifying scores to ensure that only suppliers with adequate capacity, capability and resources are shortlisted.

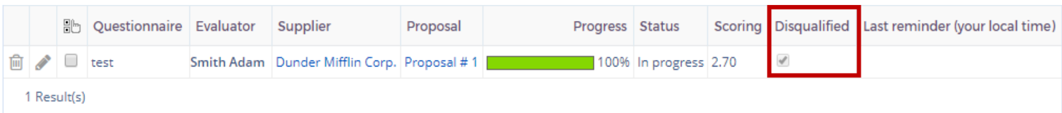
You can set up a disqualifying score for each question of the scoring form. To do so, open the quesiton's settings by clicking its *Edit* icon and fill in the **Disqualifying score below** field.



Suppliers that do not meet the minimum requirement set here will automatically be disqualified.

This status is displayed on different pages of the application:

In the *Evaluation Follow-up* tab of the *View RFx activity* step, disqualified proposals are identified in the *Disqualified* column.



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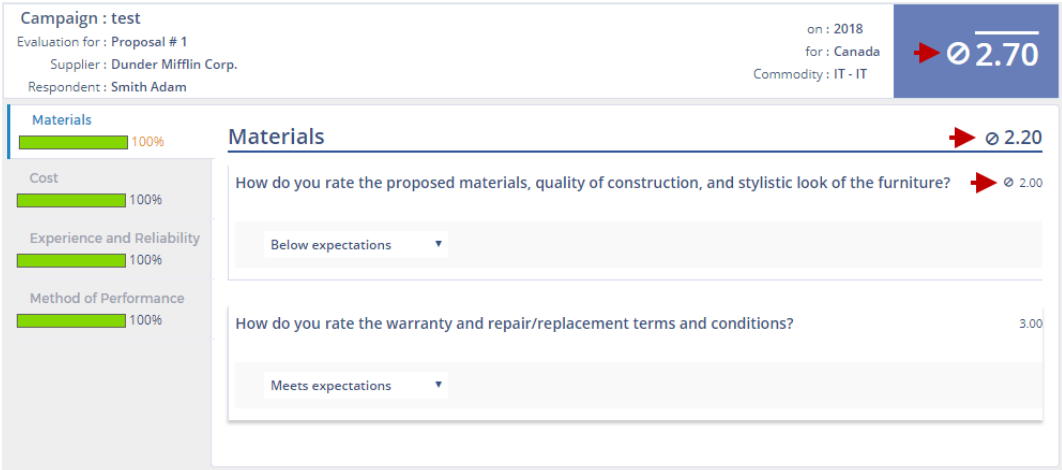
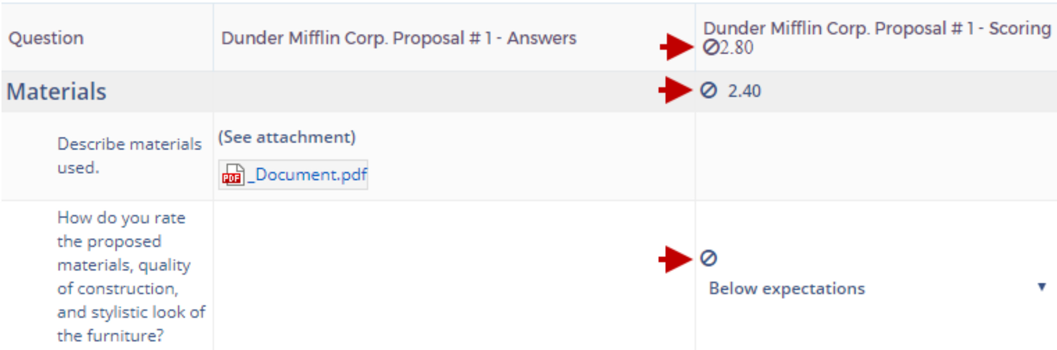
On the scoring form, the *Disqualified* status is signaled by the icon ⊘:



The same icon ⊘ is used in the *Questionnaire answers* steps:



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Configuring Additional Settings

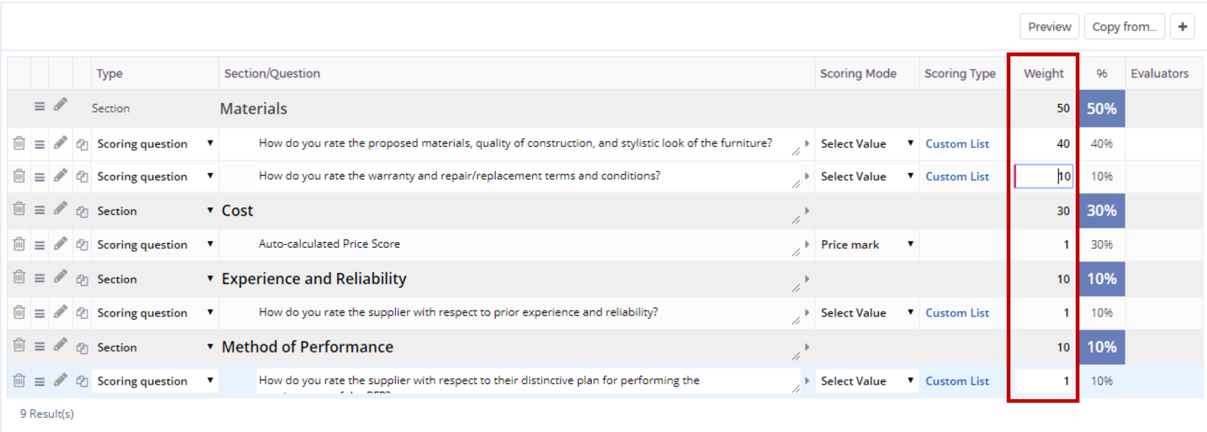
To access advanced settings, open the question's detail by clicking its *Edit* icon .

Setting	*Description*
A comment can be added to clarify the score	Select this checkbox if you wish to allow evaluators to attach a comment to the score they assign to the current evaluation criteria. The comment will show on the *Questionnaire Answers* step.
File can be attached to the score	Select this checkbox if you wish to allow evaluators to attach a file to the score they assigned to the current criteria.
Not applicable	Enable this option if you want to give evaluators the ability to indicate that the evaluation criteria does not apply to the proposal context.

Assigning Weights

You must assign weightings to scoring questions and sections in order to set their relative importance.

Weightings can be set in the *Scoring* tab by directly editing cells in the *Weight* column.



Alternately, you can set weightings on the detailed settings of each question or section (click *Edit* icon to access).

In the *%* column, percentages are automatically adjusted so that weightings sum up to 100%.

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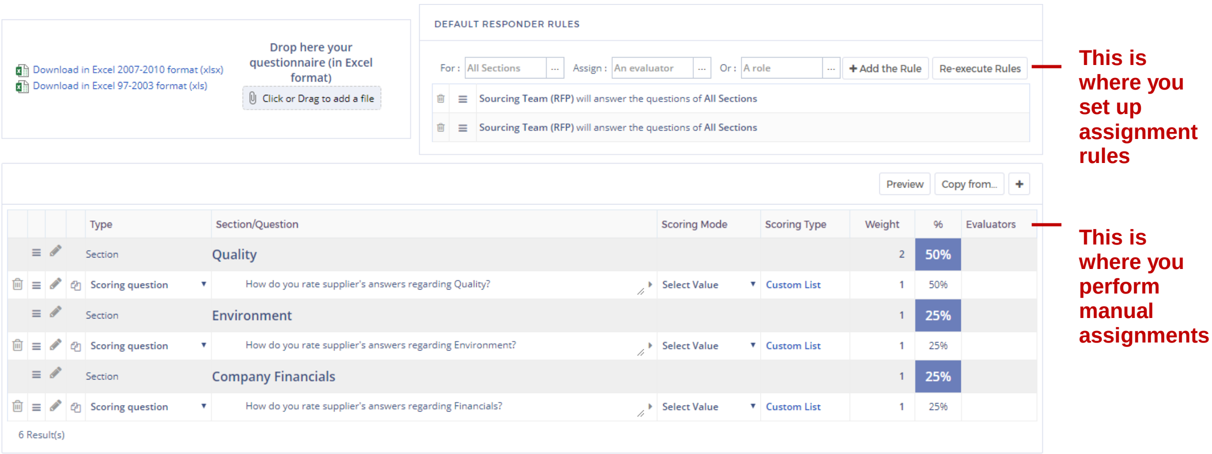
Assigning Evaluators

Evaluators are assigned in the *Scoring* tab.

If you have copied your questionnaire from an existing questionnaire or template with evaluators already set up, these evaluators will be copied to the current scoring form.

However, you can select other users either through assignment rules or through manual assignment.



Creating Respondent Assignment Rules

The respondent rules define how respondents are assigned to your questionnaire. You can create rules by using the *Sections*, *Respondents* and *Roles* selectors.

1. Select the desired sections in the *Sections* selector (if it is displayed and you wish to restrict your rule to a given part of the questionnaire).
2. Select the respondents. Use the *Respondent* selector if you wish to name a specific user. Otherwise, select a role.
   A role is a function that calls on users responding to a number of criteria. In this context, the chosen role should be in relation with proposal evaluations. Here are some examples of available roles and a description of the users they return.

Label ▲	Description
Sourcing Team (RFP)	RFP Only. Returns the people belonging to a team of a sourcing event. If the parameter "Role" is specified, only the people having that role in the team will be returned.
Internal Team (Supplier, Contract, Sourcing event)	Returns the people belonging to a team of the evaluated object (Supplier, Contract, Sourcing event, ...). If the parameter "Authorization" is specified, only the people having that authorization in the team will be returned.
Associated Sourcing Event's Team (supplier scoring)	Supplier Evaluation ONLY. Returns the people belonging to a team of a sourcing event, for which the evaluated supplier has been consulted. If the parameter "Role" is specified, only the people having that role in the team will be returned.

3 Result(s)

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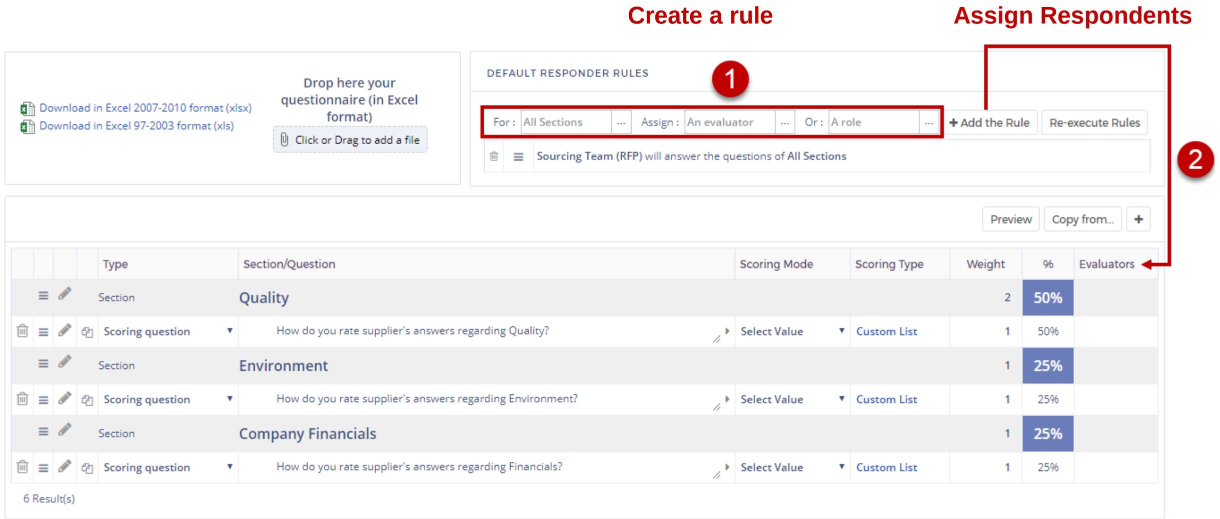
3. Click the *Add the Rule* button.
   The new rule is inserted into the rule list and applied.



Notes

In your questionnaire each section and sub-section contains the *Several respondents allowed* option.

If this option is deselected, only one respondent can be assigned, and the rules are applied in the order they are defined in the rule list until a respondent is found.

If this option is selected, all the rules are applied, and all users found are added as respondents.

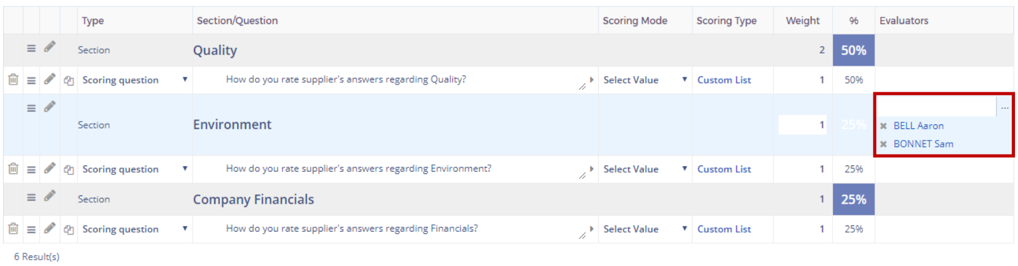
If you have multiple rules, you can reorder them by clicking the *Move row* icon ☰ next to the rule you wish to move and dragging it to the desired position.

To re-apply the rules after you have modified the rule list (reordered or deleted rules), you must click the **Re-execute** button. Similarly, use this button if you have manually assigned respondents and wish to go back to the default rule assignment.

Manually Assigning Respondents

The *Respondents* column in the questionnaire grid allows to manually add or remove respondents.

1. In the *Respondents* column, click inside the cell you wish to edit. The cell becomes editable.
2. Select the desired user or remove the existing one.



3. Save the campaign page.

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RFx Exhibits

Overview

The tab *RFx Exhibits* allows you to attach files to be sent to the invited suppliers with the RFx.

The documents attached to the RFx can be of 2 types:

- RFx Commercial documents
- RFx Technical documents

If needed, authorized access to these documents can be granted according to different user profiles and can easily be managed by the Administrator (technical experts, business experts).

The attached documents can have 2 sources:

- They can be selected from the documents linked to the current Sourcing Project (general documents, process documents, umbrella project documents listed on the tab *Setup Documents* of the project).

  When a project linked document is attached to the RFx, its *Type* is automatically converted into one of the 2 types of RFx documents (according to the parameters defined by the Administrator).
- You also have the option to create new documents.

Caution: Documents in the *Draft* status, displayed on an orange background, can only be viewed by their author. If you attach documents in this status to your RFx, suppliers will not be able to view them. To make them accessible to suppliers, the author must set the document status to *Approved/Published*.

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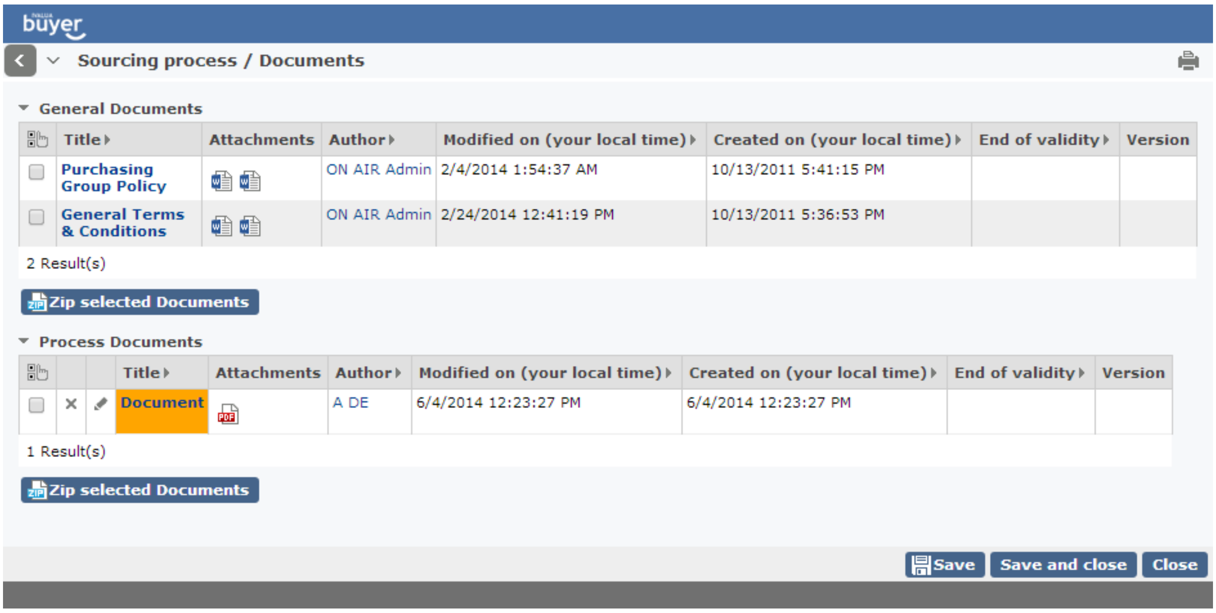
Attaching Existing Documents (Linked to the Project) to the RFx

1. On the *RFx Exhibits* tab of the Sourcing Project, click on the button **Attach from Project Library**.

   The list of files linked to the project appears. Those documents are the same documents listed at *Setup Documents* step on the sourcing project (see p.46).

   As previously, the documents are divided into different categories: General Documents, Process Documents and Project Documents (when the Sourcing Project is linked to an umbrella project).



2. Select the checkbox of the document(s) to be linked, then click on **Save and close**.

   The selected documents are added to the *RFx Exhibits* tab of the Sourcing Project.

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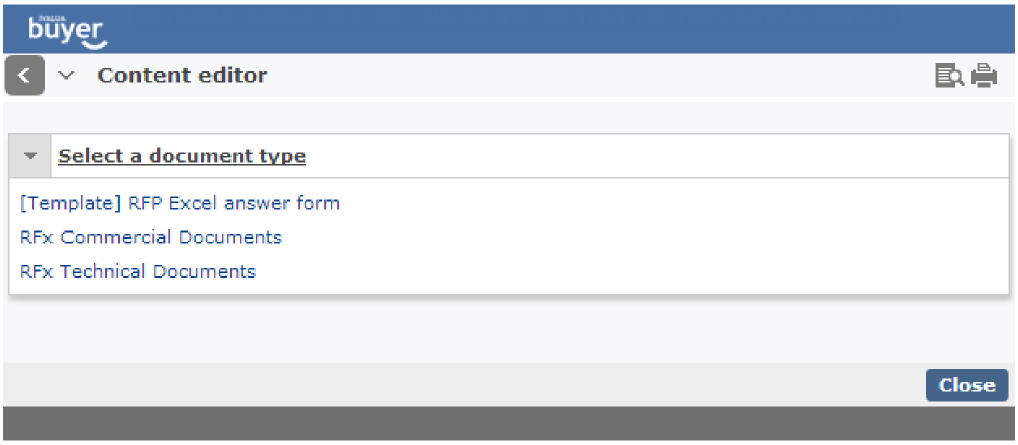
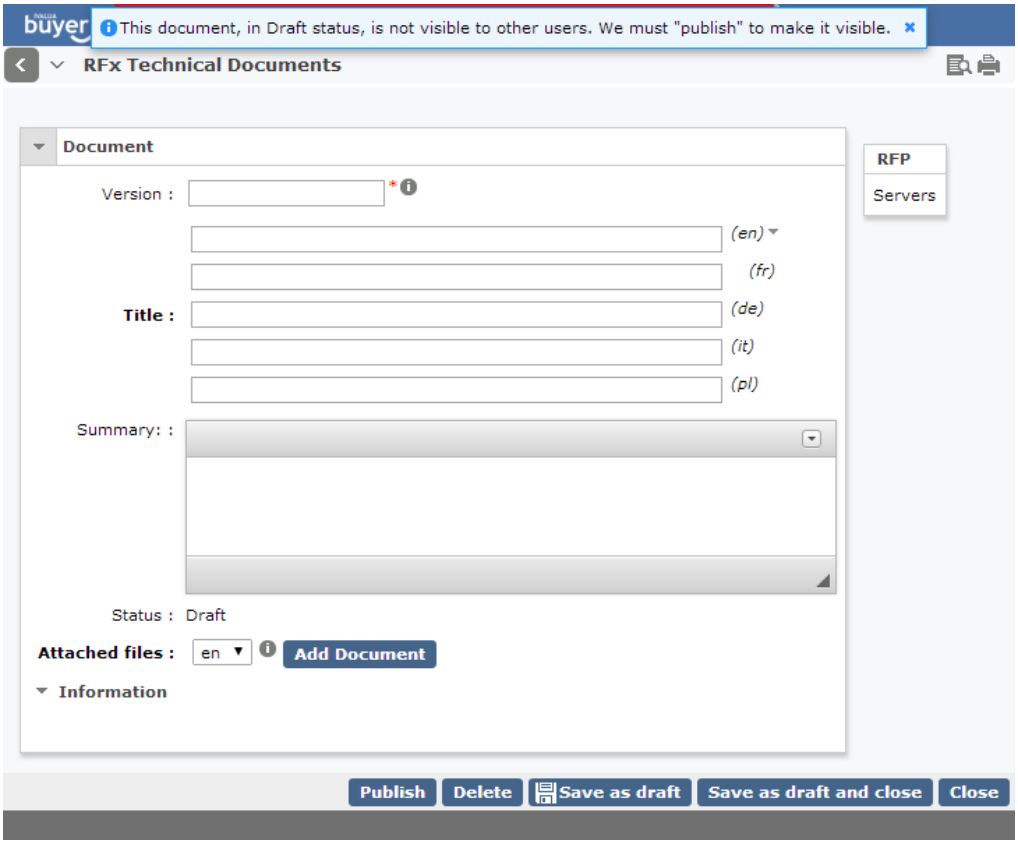
Creating and Attaching a New Document

1. On the *RFx Exhibits* tab of the Sourcing Project, click on **Create new document for this RFx**.
2. In the window displayed, select the type of document you wish to create (RFx commercial documents or RFx technical documents).



An entry window appears.



3. Enter your information in the entry fields, referring to the table below:

Field	***Description***
Version	This Field is activated only for certain types of documents
Title	Title of the document
Summary	Brief description of the document - When the document is viewed, the summary appears between the tittle and the text of the document itself.

Status	Status of the document: To be validated, Validated, Blocked or Deleted – In the list of documents, you can filter documents based on their status. Only the approved documents can be viewed by the users. Documents attached to RFx that have a Draft status cannot be viewed by suppliers.
Documents	Function that allows files to be attached to documents
RFP	The document is automatically linked to the current RFx

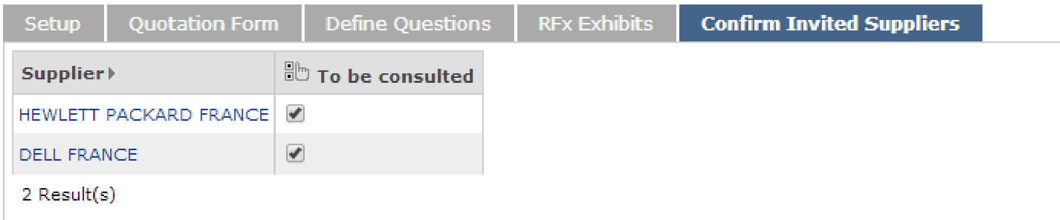
Note: The fields marked with * **are required**.

4. When the document is ready, click on **Publish**.

   You can also save it temporarily as a draft (**Save as draft** or **Save as draft and close**); however, remember that a document in the *Draft* status cannot be acced by users/suppliers: You must publish it before you send the RFx out.

Suppliers

The *Suppliers* tab brings in a list of pre-selected suppliers from the *Gather Suppliers* step.



This function allows you to manage an RFx containing different lots to be sourced from different suppliers; for each lot, you can select a subset of the suppliers originally gathered in the *Gather Suppliers* step.

Defining the List of Suppliers to be Invited for a Given Round of RFx

1. Display the *Prepare RFx* step.
2. If the RFx contains multiple rounds, select the round you wish to work on, and display the *Suppliers* tab.
3. By default, all suppliers are selected. Uncheck the unwanted suppliers.
4. Click on **Save**.

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Sending an RFx

Previewing and Testing the RFx Prior to Sending

Principle

A preview function allows you to verify the RFx before it is sent to the suppliers.

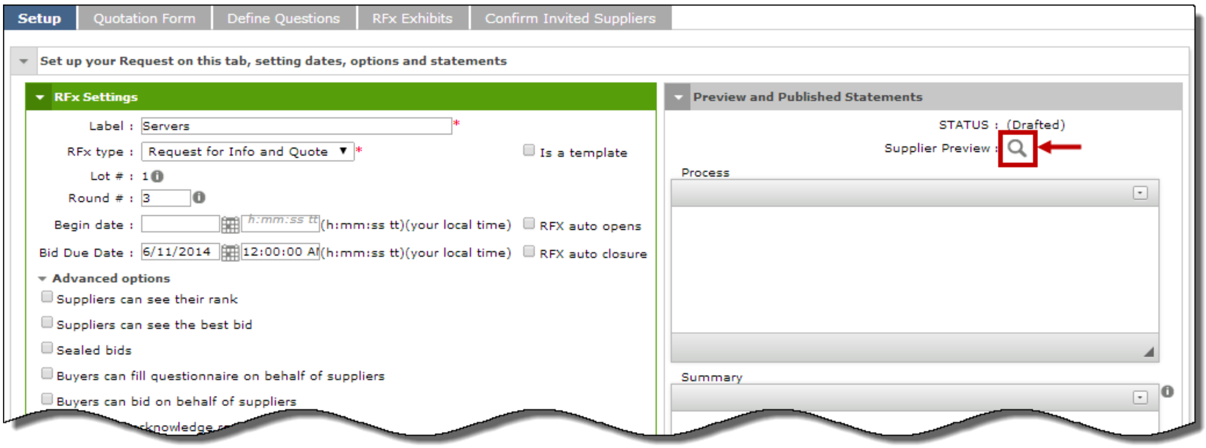
This will allow you to see the document as viewed by the suppliers.

Availability of Preview Mode

Access to the Preview mode is available as soon as the RFx is created (status: *Drafted*) and the suppliers selected (*Gather Suppliers* step). This function remains available until the RFx is sent.

Accessing Preview Mode

To display the preview, click on located in the *Setup* tab of the RFx.

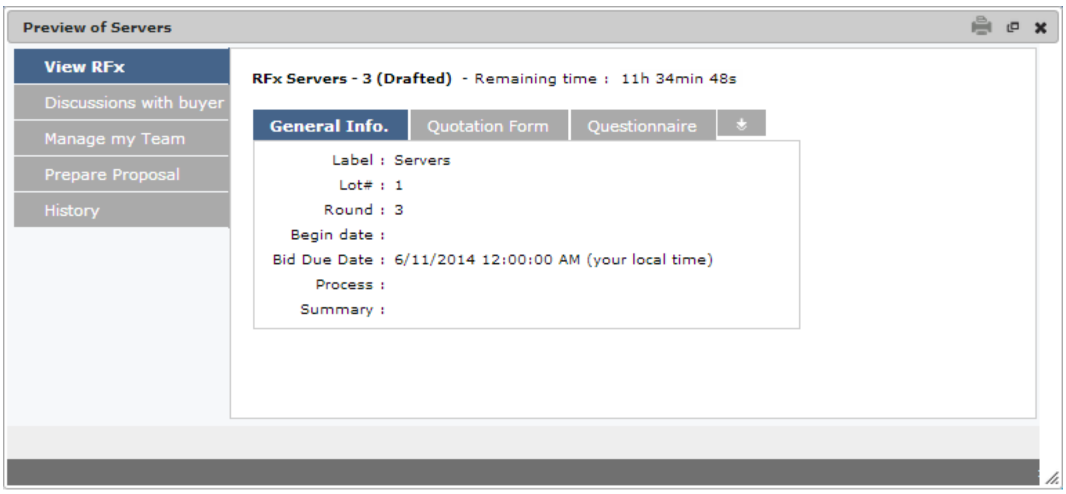


When the RFx contains multiple lots and/or rounds, the preview access icon is located above the tabs, next to the name of the current round.

Lot 1 : Consultation Bureau (Round 1 / Round 2 / Round 3)

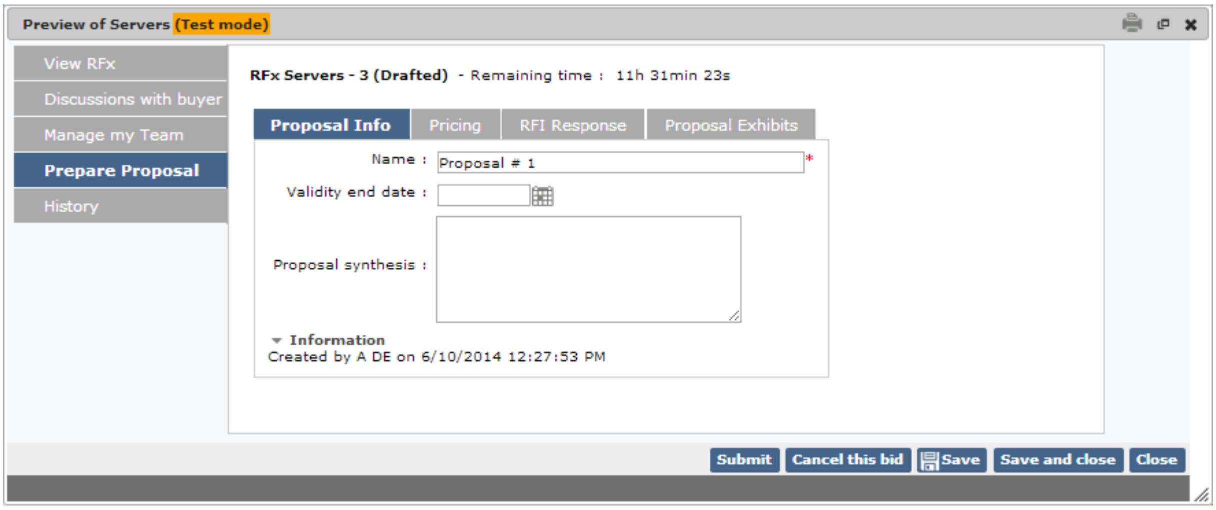
Lot 2 : Consultation Bureau (**Round 1**)

The RFx is displayed as viewed by the suppliers.



Creating a Test Proposal

In Preview mode, the *Prepare Proposal* step allows you to enter one or more proposals as if you were a supplier: depending on the tabs included in the RFx, you can quote items, respond to the questionnaire, and attach documents.



As a temporary supplier, you can undergo the complete process of an RFx response (validation included), and visualize what the supplier will be viewing, including the messages from the application in response to your inputs.

This process allows you to ensure consistency in RFx data sent to suppliers.

Proposals entered in Preview mode do not affect the following *View RFx activity* step.

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Sending the RFx

Prerequisite

An RFx can be sent out to suppliers only if:

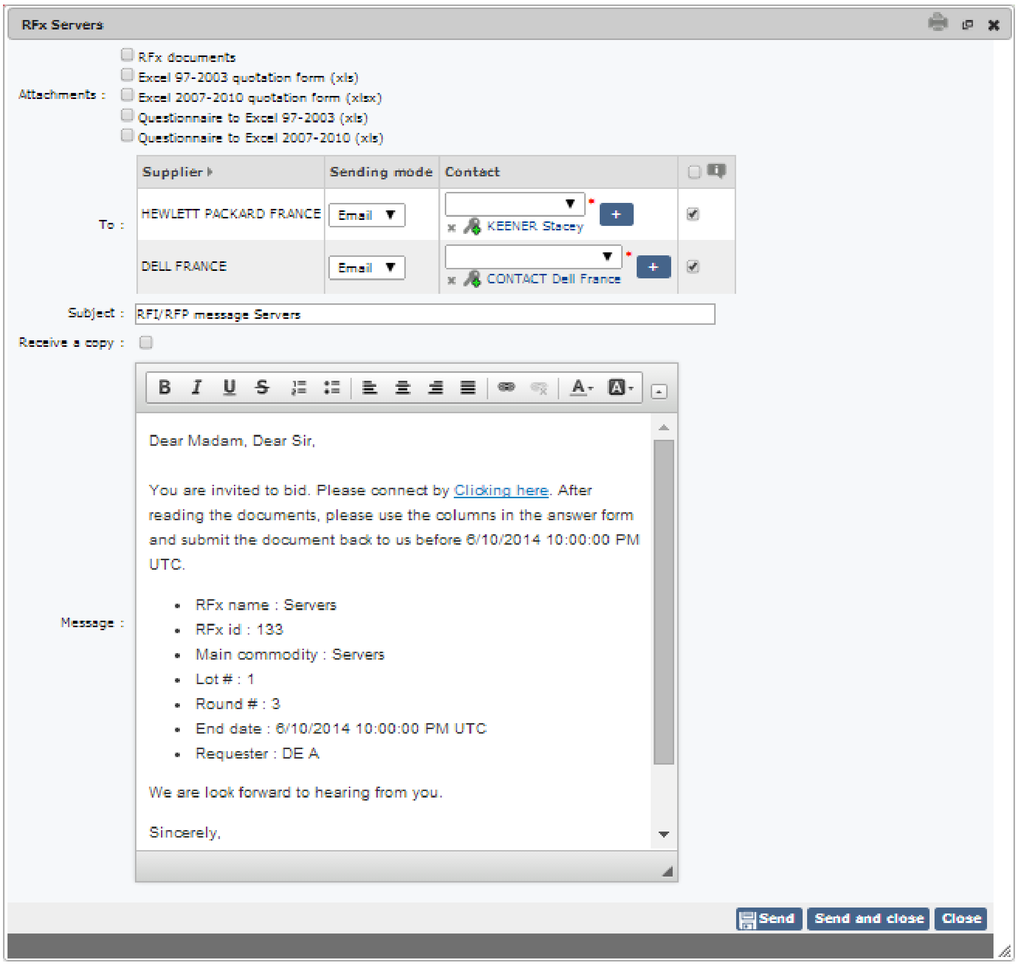
- Its Bid Due date is set (*Setup* tab)
- Suppliers have been selected in the *Gather Suppliers* step

Make sure these conditions are met before you attempt to send the RFx.

Sending the RFx

1. In your Sourcing Project, select the *Prepare RFP* step.
2. Sending the RFx happens one round at a time. If the RFx contains multiple rounds, select the one you wish to send.
3. Click on **Send notification to suppliers**.

   The RFx send window appears.



4. Possible attachments are listed. These include the documents attached in the *RFP Exhibits* tab, as well as the quotation form (*Items* tab) and RFI questionnaire in various Excel formats: select the checkbox of attachments you want to include.
5. All the invited suppliers (*Suppliers* tab of the *Prepare RFx* step) are listed. For each supplier you wish to send the RFx, select:
   - The sending mode (Email, Fax, Mail)

     ➔See About sending modes, page 130
   - The contact who will receive the invitation to bid and RFx documents

     ➔See About supplier contacts, page 129

- The checkbox (allows to select actual recipients among the suppliers listed).

  When you first send the RFx, all listed suppliers are pre-checked as recipients. On subsequent attempts, the checkbox of suppliers you already sent the RFx to will be unchecked.

6. Modify, if needed, the subject as well as the body of the message.
   The default message body includes the following merge fields:
   - RFx name: {rfp_label}
   - RFx id: {rfp_num}
   - Main commodity: {rfp_family}
   - Lot #: {rfp_lot}
   - Round #: {rfp_round}
   - End date/Bid due date: {rfp_due_date}
   - Requester: {rfp_requester} (user who sends the email)

   Merge fields are replaced dynamically with contextual RFx data.
7. To receive a copy of the email sent to suppliers, select the checkbox *Receive a copy*.
8. Click on **Send**. A message appears, prompting for confirmation.
9. Click **OK**.

   If the option *RFx auto opens* was not selected, a second message will give you the option to open it at the same time time it is sent: click **OK** to open the bidding period.

   If you already sent a round for this RFx, a message appears, asking you if you want to automatically close the preceeding round. Click **OK** to accept.
10. Click on **Close**.

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About Supplier Contacts

Selecting Contacts and Creating New Contacts

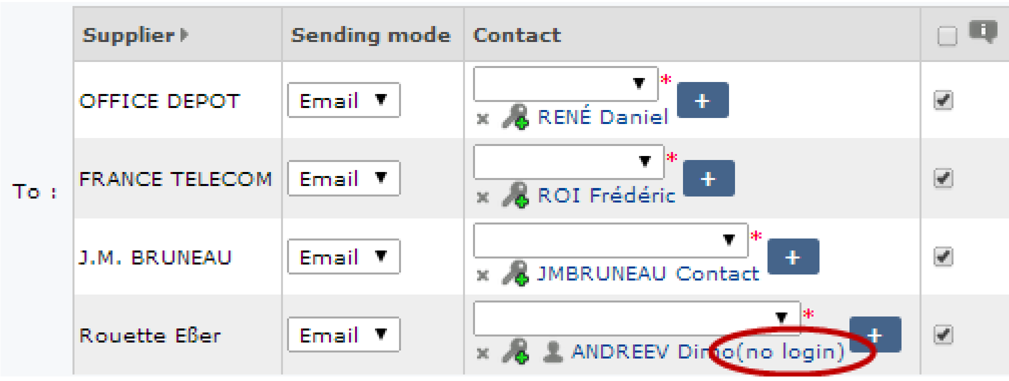
Contacts listed for selection are the contacts with a *Validated* status declared in the Supplier Record.

You can select an existing contact from the drop-down list or create a new one by clicking the icon +.

Giving Access to the Supplier Portal to Contacts

You should be aware that there are 2 types of supplier contacts: Those who have an IVALUA user account and can thus access the Supplier Portal, and those who are mere contacts who cannot access the application. If you want suppliers to be able to view and respond to the RFx online, the selected contact must have an IVALUA user account.

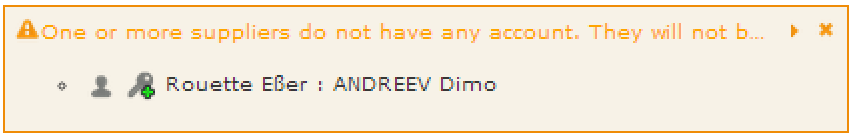
When contacts do not have access to the application, this is indicated in the parentheses next to their names, “(no login)”.



You can create an IVALUA user account for them directly from the RFx Send window, using the icons displayed before their names:

- to assign custom credentials to the contact
- to assign auto-generated credentials to the contact and send them an invitation to log in

You will again have an opportunity to create user accounts after you click the **Send notification to suppliers** button while there are recipients without login credentials. The system will display a message looking like this:



Here, too, the same icons allow you to assign login credentials.

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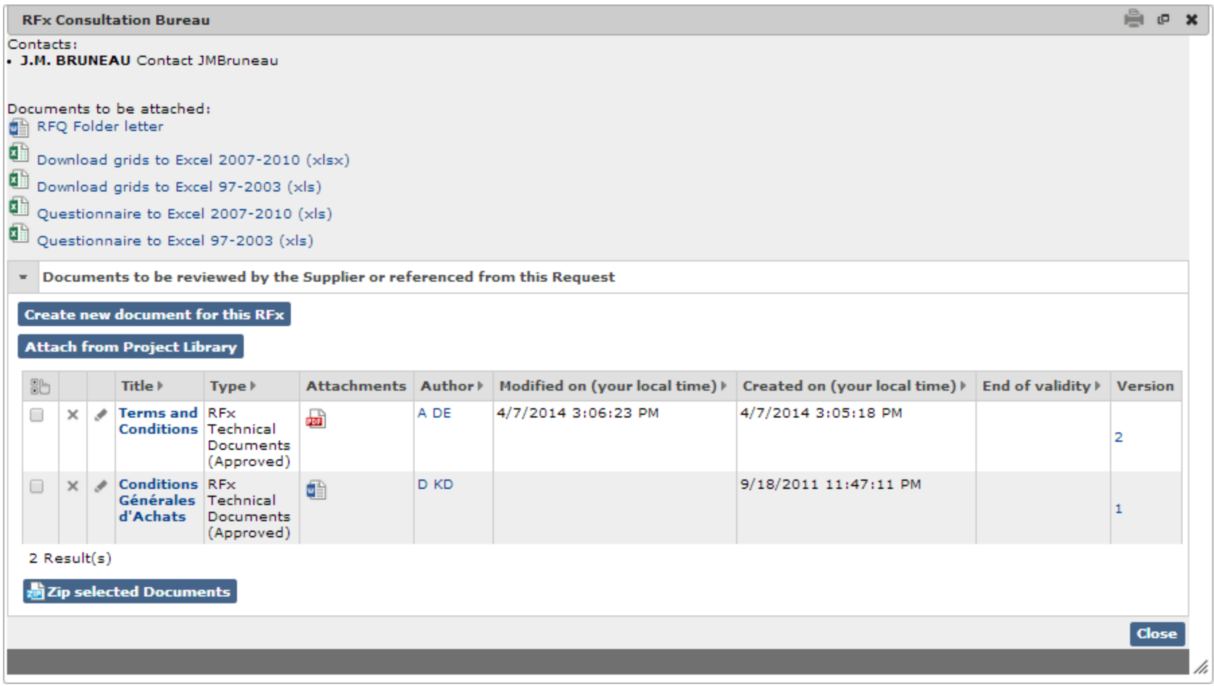
About Sending Modes

Selectable sending modes are Email, Mail and Fax. Of course, only Email will be processed directly by the system, while the other 2 modes (Mail and Fax) will require offline handling on your part (these modes allow you to address situations where the contact does not have email access).

If you selected Postal Mail or Fax as your send mode, a window will appear when you click the **Send** button: it lists the contacts for whom you chose these send modes and enables you to download RFx documents, print them and send them by mail or fax.



Modifying the RFx after you sent it

If you need to modify the RFx after you sent it and communicate the new information to suppliers, do one of the following depending on your context:

- **Re-send the RFx** if none of the suppliers have validated their proposals (same as when you send the RFx for the first time)
- **Create a new round** if one or more suppliers already validated their proposals (close the current round –see p.73, then create a new round –see p.73)

Inviting More Suppliers to Bid After the RFx Was First Sent

You can add new suppliers after an RFx was originally sent whether the first suppliers validated their response or not. To do so:

- Add the suppliers at the *Gather Suppliers* step (refer to GATHER SUPPLIERS Step, page 47)
- Send the RFx to those new suppliers: By default, only the suppliers to whom the RFx has not yet been sent will be selected as recipients in the RFx Send window.

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RFx FOLLOW-UP & ANALYSIS

VIEW RFx ACTIVITY Step

Overview

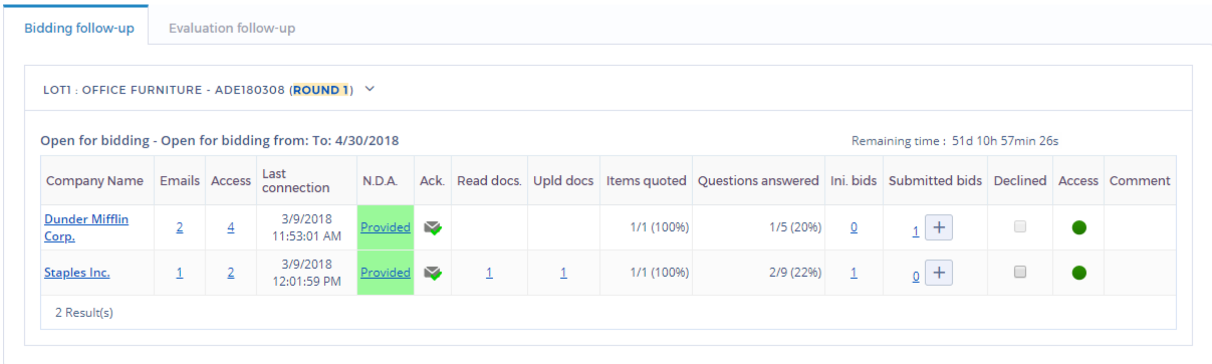
Once the RFx is out, the ball is no longer in your court until invited suppliers submit their proposals and evaluators score questionnaire answers. The *View RFx Activity* step lets you keep track of how things are going.

These is done trough two tabs:

- Bidding Follow-Up (➔p.133)
- Evaluation Follow-Up (➔p.135)

Bidding Follow-Up

As suppliers access the RFx on the Supplier portal, fill in their proposal, and then submit it, the *Bidding Follow-Up* tab keeps track of their activities.



Depending on the *Advanced Options* selected for the RFx, actions may be required on your part during this step, in particular:

- To manage and approve NDAs (➔p.135)
- To review and acknowledge receipt of supplier proposals (➔p.140)
- To create and submit a proposal on behalf of a supplier who doesn't have access to the portal (➔p.142)
- To block a supplier's access to the RFx (➔p.143)

The following table explains the different columns of the follow-up table and their function:

Column	***Description***
Company Name	The table shows all the invited suppliers (to whom an RFx has been sent). You can click on the name of the supplier to open their profile.
Emails	This column indicates the number of emails sent to the suppliers by the application (invitation to respond to the RFx). Click on the information to open the *Sent Mail* window where you can view the message ( ) and its *sent status*.
Access	Indicates the number of times the supplier viewed the RFx. Click on the information to view a log of who accessed the project and when.
Last connection	Date of the latest connection to the RFx
N.D.A.	Indicates if the supplier signed a Non-Disclosure Agreement
Ack.	Indicates if supplier has acknowledged receipt of the RFx ( ). Hover with your mouse over the icon to see the date and time of acknowledgement.

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Column	*Description*
Read Docs	Indicates the number of documents (attached with the RFx) opened by the supplier.
Uploaded Docs	Indicates the number of documents the supplier attached with his response. Click on this information to view the window *Documents uploaded by the supplier* from which you can view the documents.
Items quoted	This column shows the number of rows in the proposal that they have either started in their response (if they haven't submitted yet) or that they answered in their submitted response. The information is shown in the following format: 2/2 (100%), which shows 2 rows answered out of 2 total (which means they are 100% complete).
Questions answered	This column indicates the number of responses to the questions in the RFI questionnaire that are either in draft or submitted. If the supplier has provided multiple proposals, then the most recent submission is shown here. The information is shown in the following format: 17/27 (62%), which shows 17 questions answered out of 27 total (which means they are 62% complete.
Ini. bids	This column indicates the number of bids in draft mode. This column will only appear if the Buyer enabled the option *Buyer can access and award un-submitted bids* in the RFx Advanced Options. Click on the number in this column to see the draft.
Submitted bids	This column indicates the number of bids submitted by the supplier (i.e. **validated** by the supplier). If the Buyer enabled the option *Buyer can bid on behalf of suppliers* in the RFx Advanced Options, the Buyer can create proposals on behalf of the supplier by clicking on the + button (see *Creating and submitting a proposal on behalf of a Supplier*, page 142). This option is not compatible whith the *Sealed bid* option. Click on the number of responses in this column to open a window and examine the different proposals submitted by the supplier for the current lot/round. By default, the list of proposals is filtered to show those that are *in progress* or *validated.* From this window, you may: ▪ Consult the responses submitted by the supplier, see page 141 ▪ Acknowledge receipt of the proposals, see page 141 ▪ Shortlist or disqualify a proposal, see page 149
Declined	Select the checkbox to disqualify a supplier who did not respond.
Access	Allows the Sourcing Owner to block access to the RFx by the selected supplier. Normal Access Blocked Access

Notes

Two things can influence available columns:

- Advanced options selected for the current RFx (*Setup* tab of the *Prepare RFx* step)
- The fact that columns can be hidden by default (to display hidden columns, right-click anywhere in the colum header row; this will display a contextual menu with a list of all columns; select the checkbox of hidden columns you want to display).

Proposal Evaluation

As supplier proposals come in with completed questionnaires, scoring forms are automatically generated for each submitted proposal:

- The evaluators must use these forms to score the questionnaire sections they are assigned to (➔ p.136)
- You can follow up the evaluations progress in the *Evaluation follow-up* tab (➔p.137)

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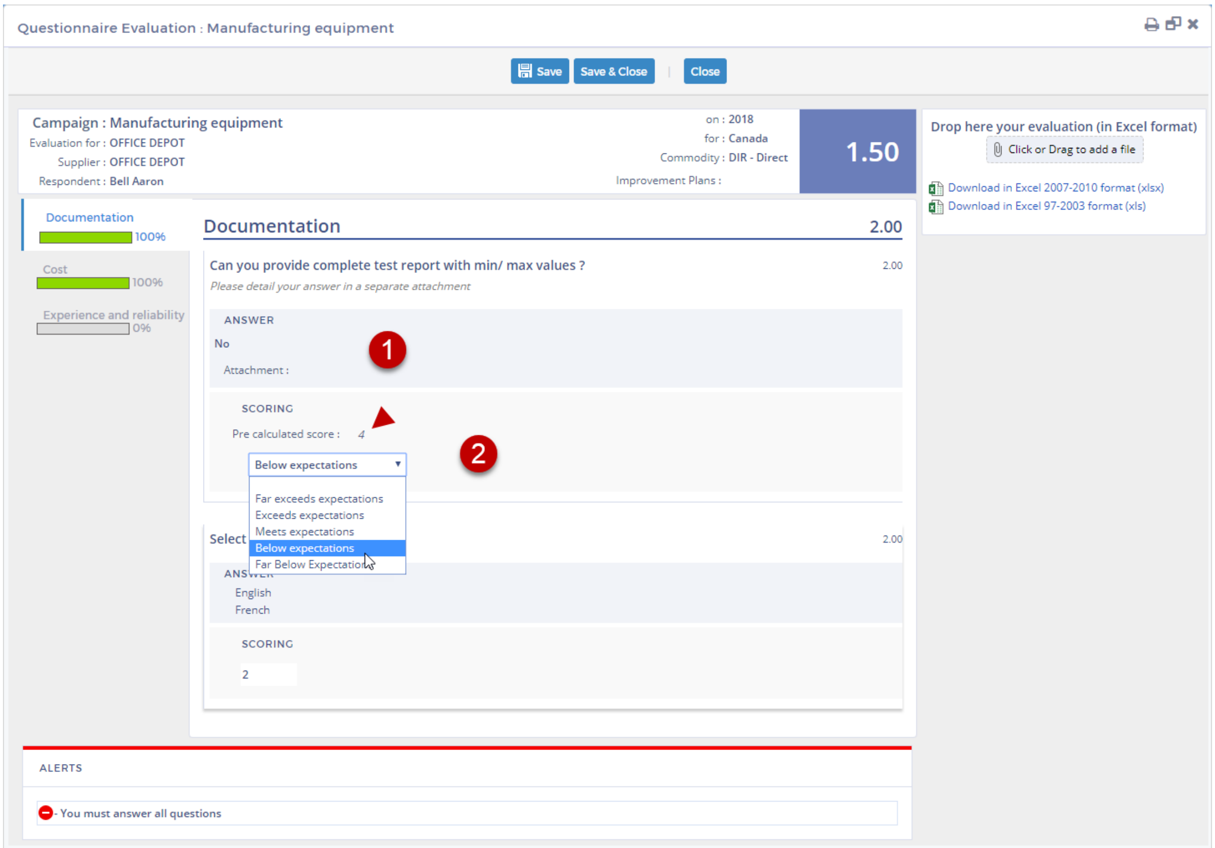
Scoring the Submitted Proposals (Evaluator Scoring)

When a supplier submits a proposal, an email is sent by the system to the assigned evaluators. To access the scoring form, they must click the link provided in the email.

Once on the evaluation page, the evaluator can consult the supplier answers and evaluate the proposal by completing the scoring questions.



Some supplier answers can be associated with scoring suggestions set up to guide the evaluators when scoring proposals. If so, these suggestions are displayed in the *Pre calculated score* field.

All scoring questions are mandatory. However, the evaluator can partially complete the scoring form, save it and return to finalize it later. The scoring form remains editable until the evaluator submits it.

Evaluators must proceed in the same way to score each proposal. When an evaluator has scored all proposals, they must navigate to the *Questionnaire Answers* step (which displays a side by side view of all their evaluations) and make a global comparative review of their scorings to ensure consistency between their different proposal evaluations. Once done, they must submit their evaluations (see page 144).

Note: The evaluators can also access the scoring form directly from the RFx:

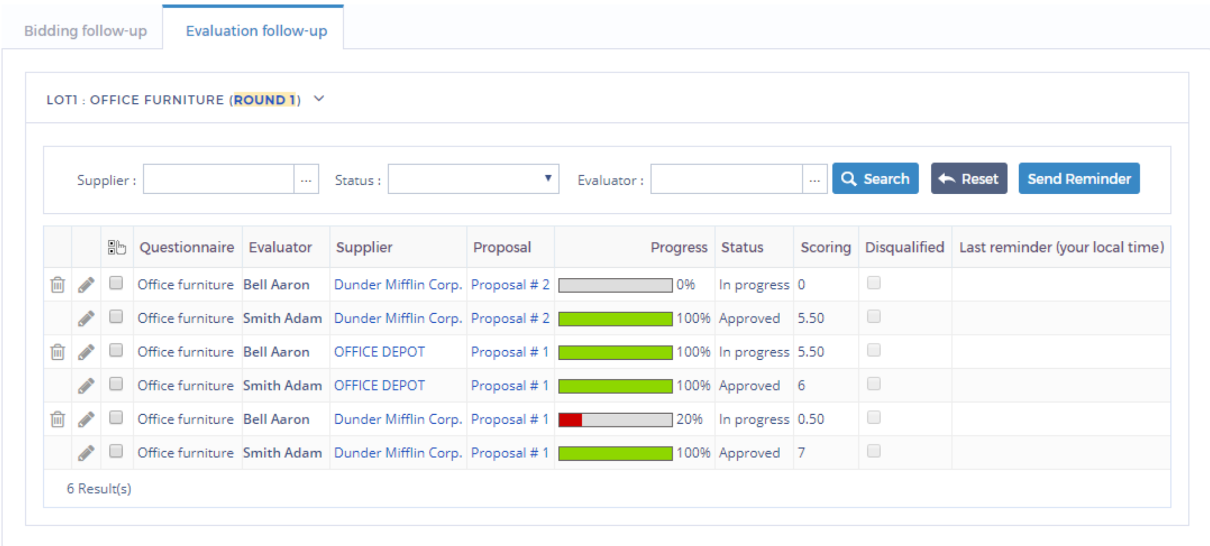
- *View RFx activity* step ➔ *Evaluation Follow-up* tab: allows to open the scoring forms individually (➔ p.137)
- *QUESTIONNAIRE ANSWERS* step (➔ p.144).

Following Up the Evaluation Progress

The *Evaluation follow-up* tab shows at a glance the evaluation progress.

It displays the list of the scoring forms generated by the system. For each proposal submitted by a supplier, a scoring form is generated for each evaluator assigned to the scoring questionnaire.

Suppliers may submit multiple proposals, and each is evaluated separately. You can distinguish the different proposals based on the proposal name indicated in the *Proposal* column. Note that if a supplier submits a proposal and then submits another one as a replacement for the first, the replaced proposal will not be evaluated.



The *Progress* column indicates the rate of completion of the scoring questionnaire.

The *Status* indicates whether the evaluation has already been submitted (*Approved*) or not *(In progress*). Remember that each evaluator must submit all their scoring forms in one go, which is why a scoring form with a 100% completion can still be *In progress*.

Notice also the *Disqualified* column (which is read-only). If the questionnaire was configured to disqualify proposals that score below a certain value and an evaluator assigns such a score to the current proposal, then said proposal will automatically be marked as disqualified by the system.

Use the **Send Reminder** button in the search filters area to send a reminder to late respondents.

To communicate with evaluators using this feature, in the list of evaluations, select the checkbox of each evaluation for which you want to send a reminder, and then click the **Send Reminder** button. The date and time the reminder was sent is displayed in the **Last Reminder** column.

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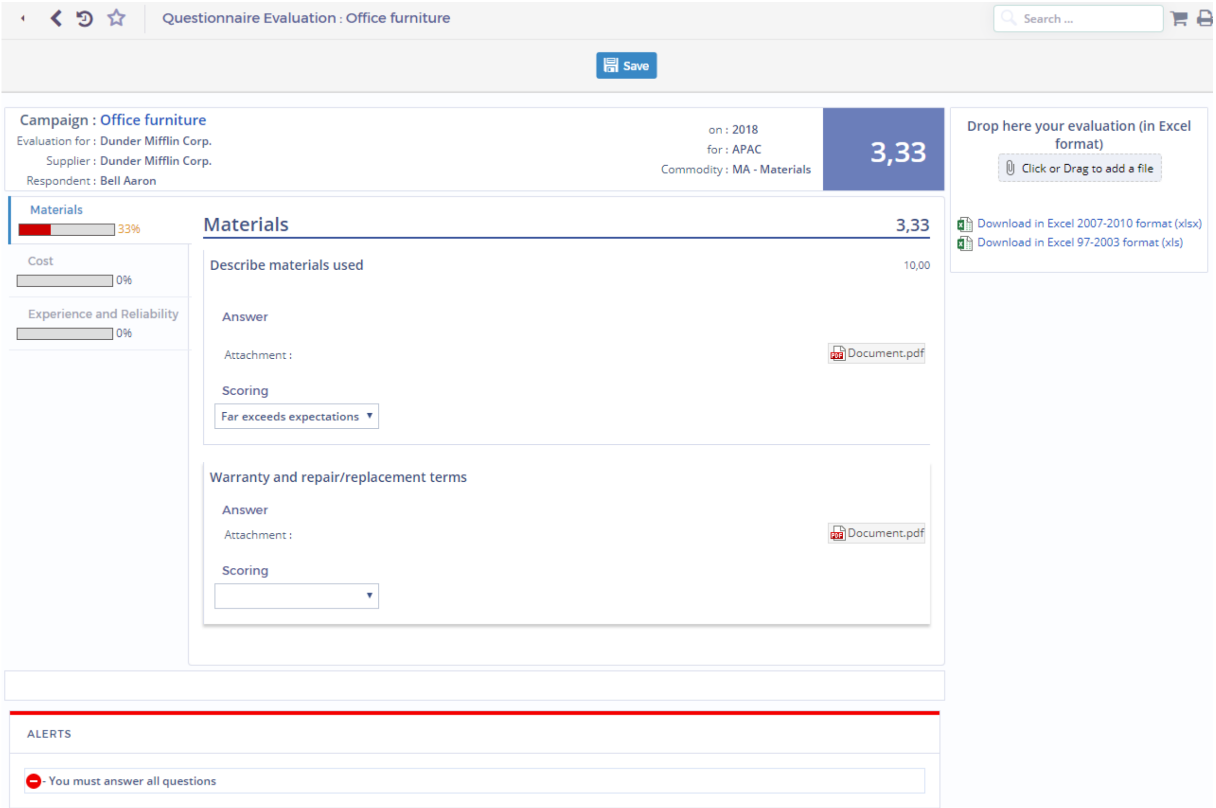
You can open a scoring questionnaire form by clicking the *Edit* icon of a row:



From there, you can view the completion percentage per tab (that is per questionnaire section).

Managing Non-Disclosure Agreements

Principles

If you have selected the option: *Suppliers must sign a Non-Disclosure Agreement* when creating the RFx (*Setup* tab of the *Prepare RFx* step, Advanced Options), the supplier needs to submit this document prior to accessing any RFx material.

Depending on the configuration, the NDA signed by the supplier may or may not require your approval.

- NDA approval required:

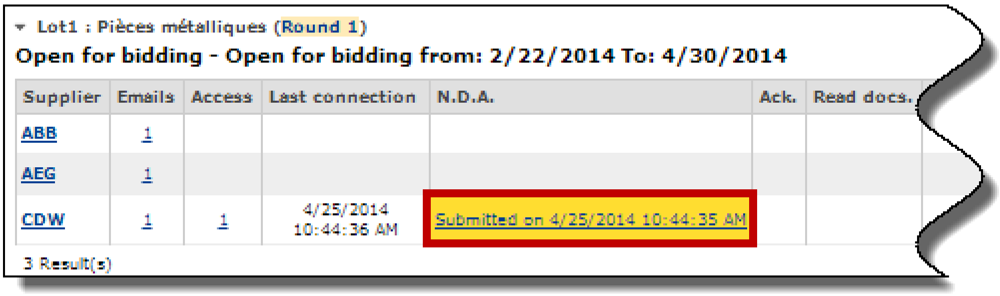
  The supplier transmits the NDA and you receive a notification informing you that your approval is required.

  When approved, the supplier is informed via email that the RFx is now open for access and response.
- NDA approval not required:

  The supplier transmits the NDA and can immediately access the RFx to construct a response.

Approving or Denying an NDA Signed by the Supplier

1. Select the *View RFx activity* step in the Sourcing Project
2. In the NDA column, click on the link *Submitted on …*



The window *NDA Management* pops up.

3. Review the document sent by the supplier. To do so:
   - Click on the attached file name.
   - The file is downloaded in your browser. **Open** to read the document or **Save** to a location of your choosing.
4. Select either the option *Validate* or *Reject.* In the case of a denial, note the reason for the decision in the comment field below.

5. Click on the **Save and Close** button.

   Upon saved approval, the NDA is marked as *Validated* which permits the supplier to proceed with the RFx response.

   Upon saved denial, the NDA is marked as *Rejected* which the supplier may address by re-registering a new document.

Reviewing and Acknowledging Receipt of Supplier Proposals

Reviewing Sealed Bid Offers

Characteristics of Sealed Bids

When the option *Sealed Bids* is selected on the RFx *Setup* tab, under *Advanced Options,* inbound proposals may not be opened by buyers until the date and time of RFx closure has passed.

A lock icon indicates the state of the sealed bids.

Until bids are un-sealed, all functionalities that require direct or indirect access to proposal content will be disabled:

- *Documents* uploaded by the supplier cannot be opened.
- Proposals may not be rated or qualified (shortlisting, etc.).
- The option *Buyer can access non validated bids* allows the supplier to see whether proposals have are being prepared, but they may not click to see the draft proposals.
- The *Analyze RFP answers* step is not accessible.

Prerequisites for Opening Sealed Bids

The round must close to allow for the Sealed Bid to be opened.

Rounds are closed automatically if the option *RFx auto closure* was selected. Alternatively, you may click on the **End RFx Round** button to manually close the round.

Opening Sealed Bids

Once the round closes, you may open the Sealed Bids either on the *Prepare RFP* step, *View RFx Activity* step or *Analyze RFP answers* step:

1. Select the lot and round in question.
2. Click on the lock icon, . On the *Prepare RFP* step*,* click on the **Open Bids** on the action bar below.

   A confirmation message pops up.
3. Click on the **OK** button and the lock icon will change to to indicate that the bids are now unsealed.

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Reviewing the Proposals Submitted by the Supplier

1. In the *Bidding follow-up* tab of the *View RFx Activity* step, the proposals submitted by suppliers are enumerated in the *Submitted bids* column.

   Note: You may also review the proposals on the *Analyze RFP answers* step under the *List of proposals* tab.

2. Click on the number of received offers. A window pops up listing all the submitted proposals from that specific supplier.
3. To open a specific proposal, click on its label.

A window opens in which you can review the different tabs that comprise the proposal from the supplier.

In an RFP, if a questionnaire was included in the request, the *View RFx Activity* step includes a second tab: *Evaluation follow-up*.

Acknowledging Receipt of a Proposal

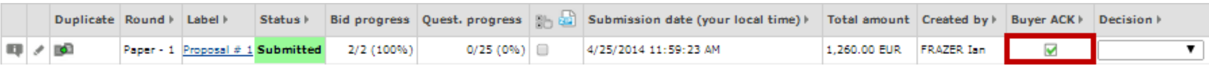
1. Select the *View RFx Activity* step in the Sourcing Project.
2. Click on the number of proposals in the *Submitted bids* column. A window pops up listing all the submittd proposals from that specific supplier.

   Note: You may also review the proposals on the *Analyze RFP answers* step under the *List of proposals* tab.

3. To acknowledge receipt, click on the **Acknowledgement** button (*Buyer ACK* column).

A confirmation message pops up.

4. Click **OK**.



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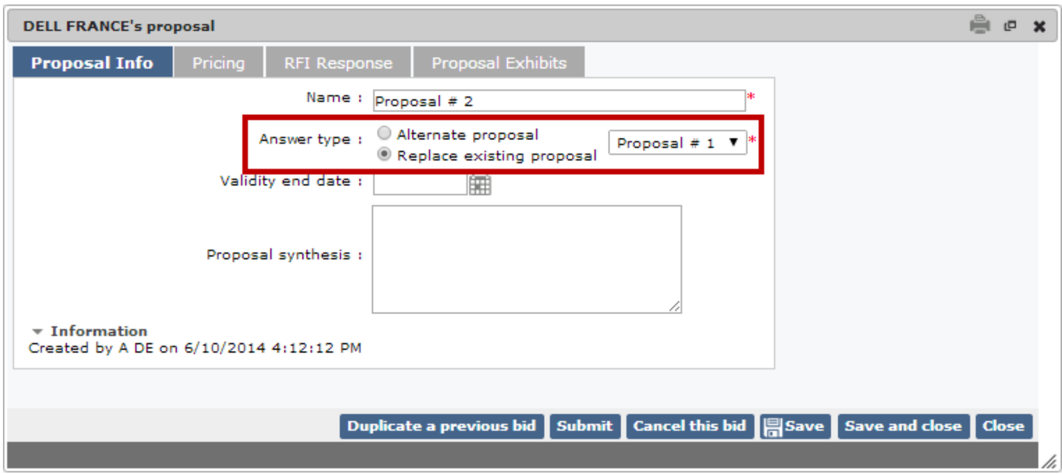
Creating and Submitting a Proposal on Behalf of a Supplier

Creating a Proposal on Behalf of a Supplier

This function allows for capture of a Supplier's proposal in the RFx process even when the supplier cannot or will not access the portal on their own.

This function is available if the option *Buyers can bid on behalf of suppliers* was selected in the *Prepare RFP* step, under *Advanced Options* (see p. 77). Note that this advanced option cannot be used if the *Sealed Bid* option is selected.

1. In the Sourcing Project, select the step *View RFP Activity*.
2. In the *Submitted Bids* column, click on the + button to create a proposal. A window for entering the proposal is opened.
3. If another proposal was previously created, you can copy it to ease the input of the new proposal. To do so, click **Duplicate a previous bid**, and then, in the window that pops up, click the *Duplicate* icon of the relevant proposal.
4. Also, if previous offers exist for this round and this supplier, specify whether the new proposal:
   - Is an alternate proposal
   - Is meant to replace an existing proposal (select proposal to be replaced)



5. Enter the proposal information provided off-line by the supplier.
6. **Save** (note that the proposal is now saved as a draft and not yet submitted for rating and comparison).

Attaching Documents to a Proposal Created on Behalf of a Supplier

1. In the proposal you are entering, go to the *Proposal Exhibits* tab.
2. Select the type of document, the name and the control number (if applicable)
3. Click on the **Choose File** button
4. Find and select the file to be attached, then click **Open.**
5. Click on the **Attach** button. Repeat setps 2-5 to add other documents if necessary.

Submitting a Proposal Created on Behalf of a Supplier

Once the proposal is finalized, it must be submitted so that it can be accounted for.

1. Open the draft proposal to be submitted.
2. Click on the **Submit** button. A message pops up confirming the action.
3. Click **OK**. This offer may not be modified now (though it can be replaced).

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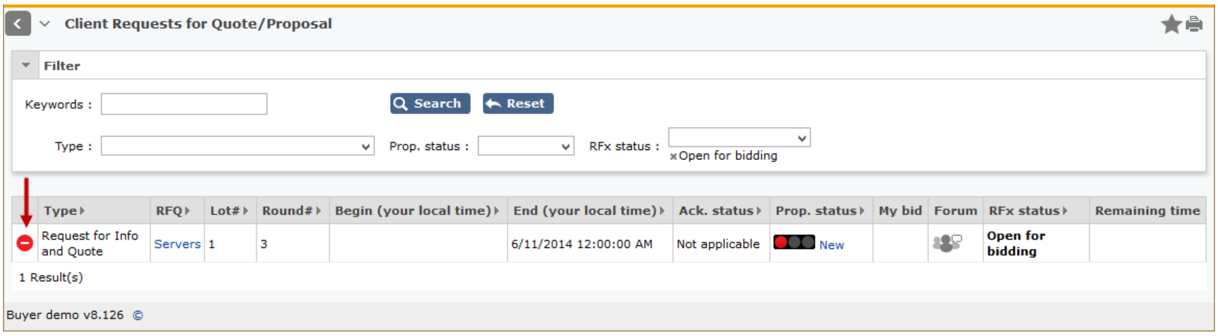
Managing Accesses to the RFx

Blocking Access to the RFx

It is possible to block access to a particular supplier when his participation is no longer necessary.

1. In the *Answers Follow-up* step, click on the icon of the supplier (*Access* Column). A message will prompt for your confirmation
2. Click **OK** to block access to the supplier.

On their home page, the suplier no longer has access to that particular RFx.



NB:

Blocked suppliers are not notified in the case of early closure of the RFx.

Denying access to a participating supplier does not affect the number of participants in the different indicators on the project.

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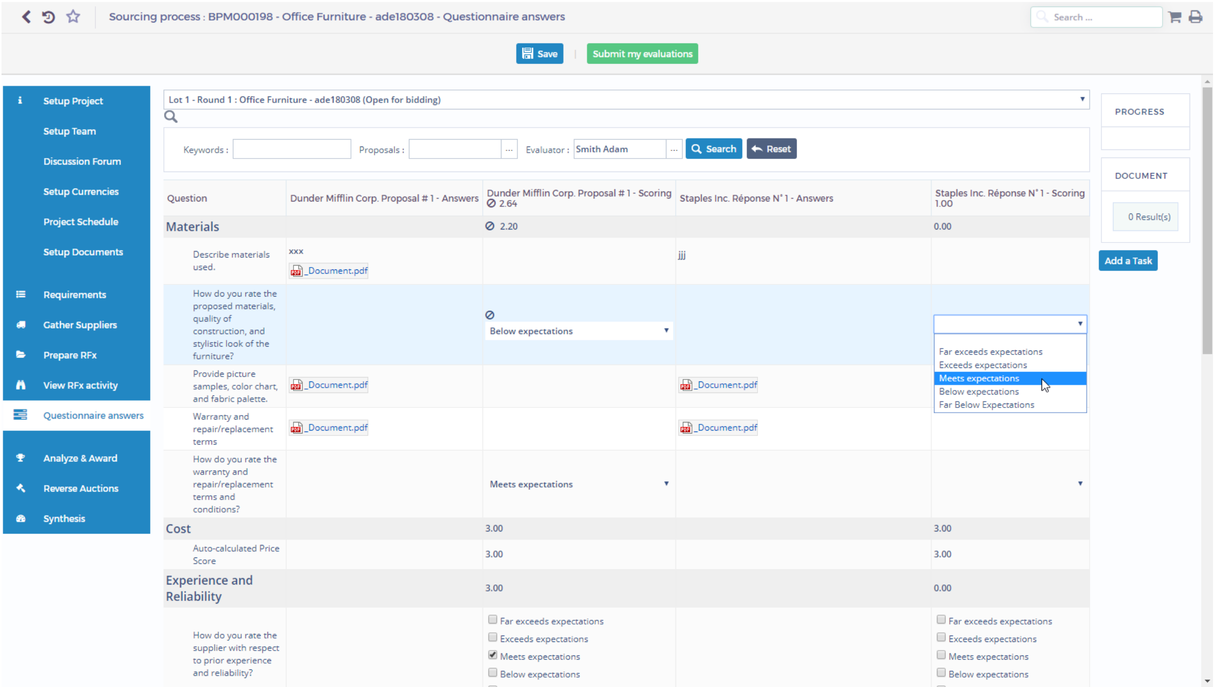
QUESTIONNAIRE ANSWERS Step

The purpose of the *Questionnaire Answers* step is to:

- Allow evaluators to gain a global insight on all their scorings and, if needed, adjust them
- Submit their scoring forms

This step shows a side-by-side view of suppliers' responses. For each supplier proposal, this page presents two columns, one for the supplier answers to the initial questionnaire and the second for scoring.



Evaluators can only score the sections of the questionnaire they are assigned to. Some evaluations might have already been completed directly in the scoring form (➔p.136). If so, in the *Questionnaire Answers* step evaluators can still adjust their scorings to ensure the homogeneity of his answers across all proposals.

When done, evaluators must click **Submit my evaluations** so that their scorings are taken into account in the overall score of each proposal (which is displayed in the *Proposals* tab of the *Analyze & Award* step). The status of the submitted evaluations changes to *Approved*.

ANALYZE & AWARD Step

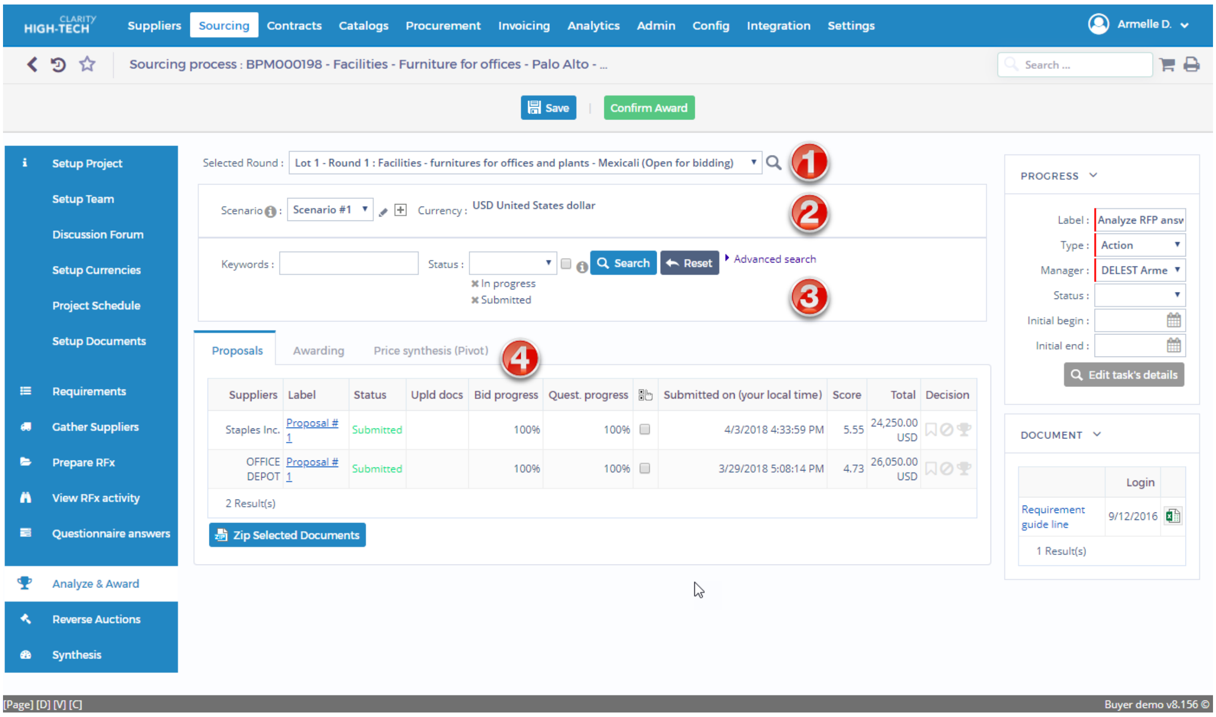
Overview

The *Analyze & Award* step allows you to conduct an in-depth analysis of supplier responses and award contracts based on informed decision making.

This step can only be carried out once the suppliers have submitted a response to the RFx.

Getting Familiar With the User Interface

Step Overview



1 Round selection

When the RFP contains multiple rounds, this is where you specify the round to be displayed for analysis.

2 Scenario management / Analysis currency

This area allows you to save multiple award scenarios for comparison. It also displays the analysis currency, which is the *Reference currency* set up in the SET UP CURRENCIES step (➔p.36); when the RFP permits suppliers to express their proposals in various currencies, all financial data is converted into the analysis currency to ensure you are comparing apples to apples.

3 Search filters

Selected filters determine the data displayed in the tabs below. They affect all tabs in the same manner.

4 Tabs

The tabs contain the proposal information you want to review to make your award decision.

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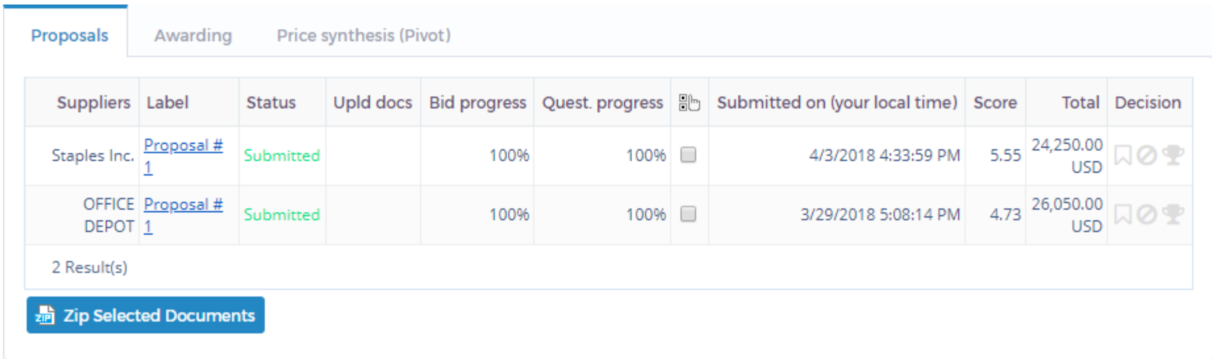
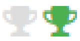
- Proposals (see p.146)
- Awarding (see p.147)
- Price synthesis (see p.148)

Proposals Tab

The *Proposals* tab presents received proposals of the selected round, filtered by default on the statuses *In Progress* and *Submitted*. Depending on what you want to view, it is possible to display proposals from other rounds (by selecting the desired round in the *Selected Round* filter), as well as proposals that have been replaced or canceled (*Status* filter).



The table below gives a description of the various columns displayed in this tab:

Field	***Description***
Supplier	Name of supplier who submitted the proposal
Label	Proposal label
Status	Proposal status
Upld docs	Files uploaded by suppliers
Bid progress	Completion status of the pricing grid, expressed in the form: Number of quoted items / Total number of items (percentage)
Quest. progress	Completion status of the RFI questionnaire, expressed in the form: Number of submitted questions / Number of sent questions (percentage submitted)
	Icon for downloading proposals as a ZIP archive (see page 149)
Submitted on (your local time)	Proposal submission date
Total	Proposal total amount
Rating	Proposal evaluation rating (average of ratings if the proposal has received multiple ratings) For proposals still to be evaluated, use the link <u>*Click to rate*</u> to access the evaluation questionnaire.
Decision	For qualifying or disqualifying proposals (see page 149)  Shortlist  Disqualify  Award In an RFx without item, the above ‘Award’ icon is the only way to award the contract.

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Awarding Tab

The *Award* tab is just what the name says –an area dedicated to awarding contracts to participating suppliers.

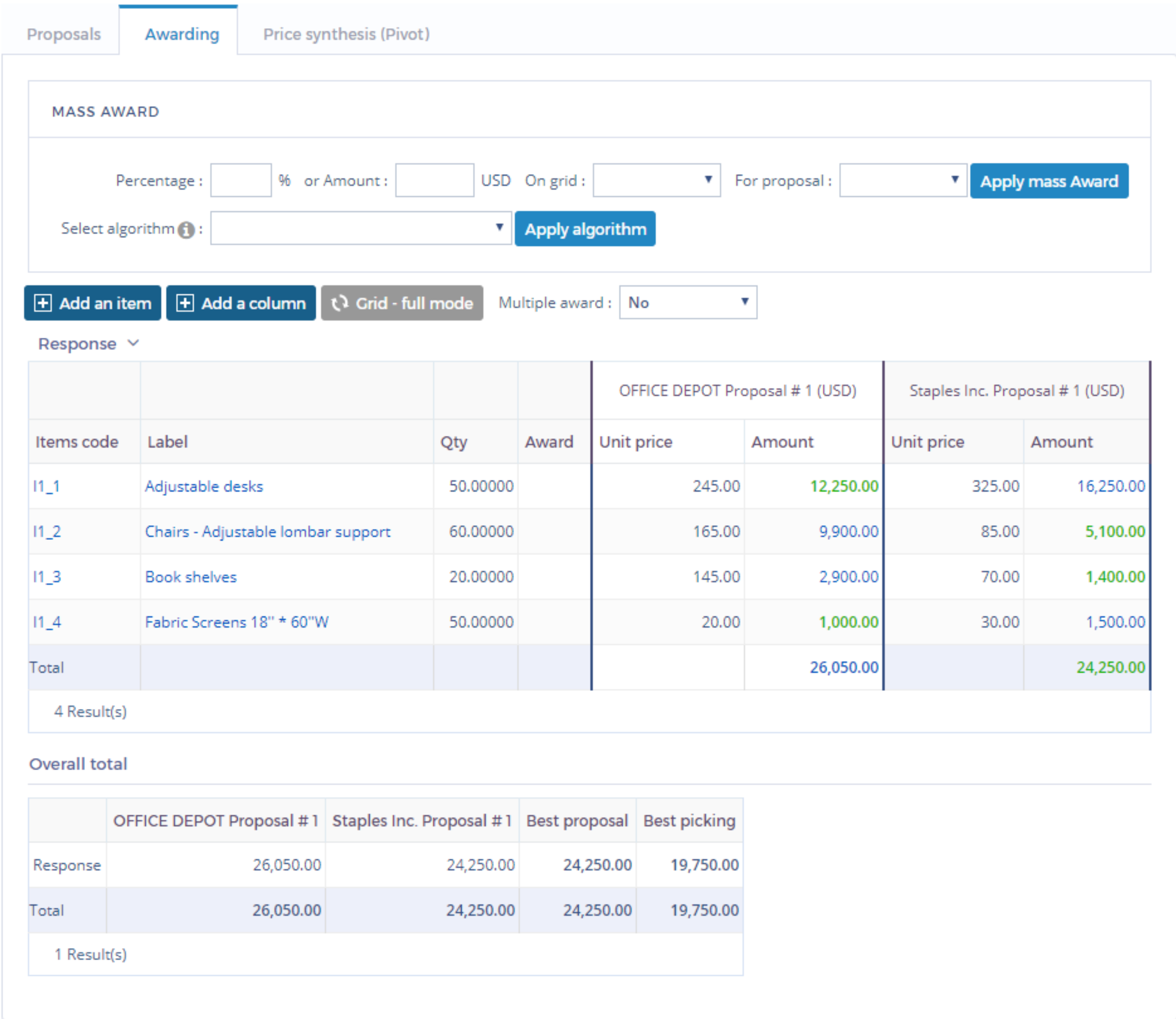
The tab presents a price comparison per item and per supplier proposal, which you can view either in light mode (default) or full mode.

The *Overall Total* table shows the best proposal and best picking price (best total price when choosing the best offer per item).

Prior to awarding, you may need to fine-tune the price comparison and make sure you factor in all relevant financial items by adding price adjustment items and columns (➔p.149).

At the time of awarding, you can choose among a number of approaches. You can:

- Apply a pre-defined award algorithm (➔p.152)
- Award one or more items to a single supplier (➔p.153)
- Make split awards in quantity, percentage or amount (➔p.154)
- Award an RFx without item (➔p.154)



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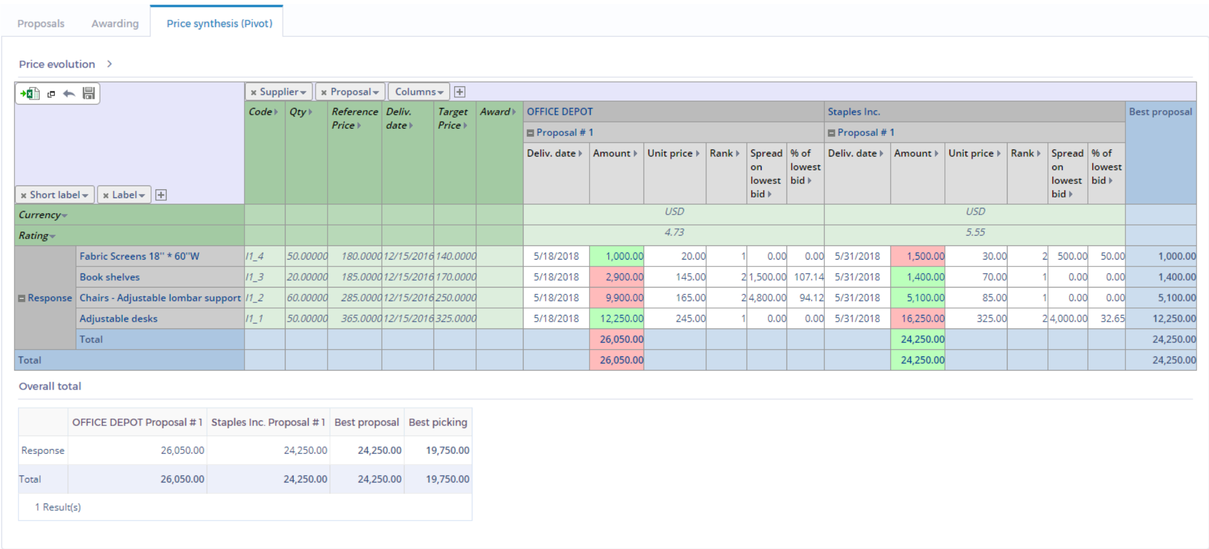
Price Synthesis Tab



Proposals | Awarding | Price synthesis (Pivot)

Price evolution >

		Code	Qty	Reference Price	Deliv. date	Target Price	Award	OFFICE DEPOT						Staples Inc.						Best proposal
								Proposal # 1						Proposal # 1						
Short label	Label							Deliv. date	Amount	Unit price	Rank	Spread on lowest bid	% of lowest bid	Deliv. date	Amount	Unit price	Rank	Spread on lowest bid	% of lowest bid	
Currency								USD						USD						
Rating								4.73						5.55						
Response	Fabric Screens 18'' * 60''W	I1_4	50.00000	180.0000	12/15/2016	140.0000		5/18/2018	1,000.00	20.00	1	0.00	0.00	5/31/2018	1,500.00	30.00	2	500.00	50.00	1,000.00
	Book shelves	I1_3	20.00000	185.0000	12/15/2016	170.0000		5/18/2018	2,900.00	145.00	2	1,500.00	107.14	5/31/2018	1,400.00	70.00	1	0.00	0.00	1,400.00
	Chairs - Adjustable lombar support	I1_2	60.00000	285.0000	12/15/2016	250.0000		5/18/2018	9,900.00	165.00	2	4,800.00	94.12	5/31/2018	5,100.00	85.00	1	0.00	0.00	5,100.00
	Adjustable desks	I1_1	50.00000	365.0000	12/15/2016	325.0000		5/18/2018	12,250.00	245.00	1	0.00	0.00	5/31/2018	16,250.00	325.00	2	4,000.00	32.65	12,250.00
	Total								26,050.00						24,250.00					24,250.00
Total									26,050.00						24,250.00					24,250.00

Overall total

	OFFICE DEPOT Proposal # 1	Staples Inc. Proposal # 1	Best proposal	Best picking
Response	26,050.00	24,250.00	24,250.00	19,750.00
Total	26,050.00	24,250.00	24,250.00	19,750.00

1 Result(s)

The *Price Synthesis* tab contains a pivot table that summarizes the financial data from quotation grids originating from the various proposals of participating suppliers.

In this table, you can easily reorganize data to your conveniance by simply dragging and dropping rows and columns. This ability can help you analyze the impact of various award scenarios and help decide on which scenario is the best.

For each item, the table highlights the lowest proposal in green and highest in pink.

For more information about how to use the Price Synthesis pivot table, see page 156.

Prior to Awarding: Fine-Tuning the Price Comparison Table

Shortlisting or Disqualifying Proposals (Proposals tab)

This is optional but can help you clear a crowded price comparison table. The choices you make here can be modified anytime until you confirm an awarding scenario; and even then, you retain the ability to unvalidate the awarding scenario.

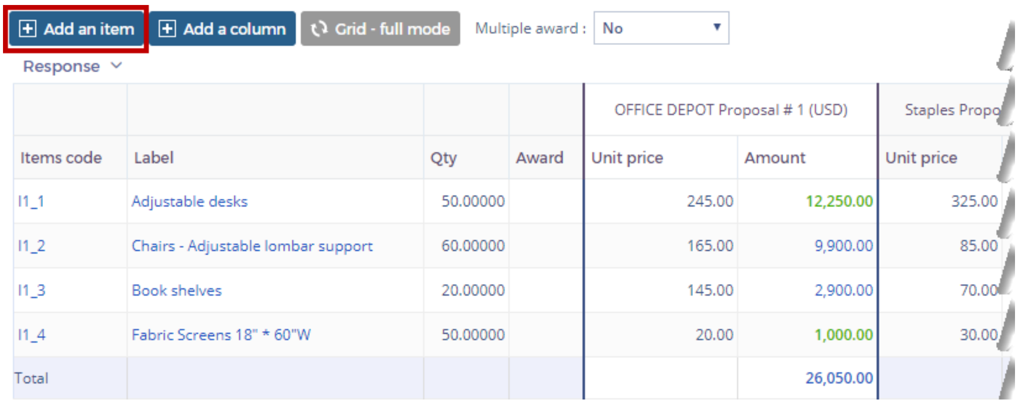
1. Display the tab *Proposals*.
2. In the *Decision* column, select the (*Shortlist*), (*Disqualified*) or (*Award*) icon. A message prompting you to confirm appears.
3. Click **OK** to confirm.

Adding Price Adjustment Items (Awarding tab)

Price adjustment items enable the buyer to factor in various cost considerations such as additional costs (transportation, import taxes, supplier switching, etc.), varying levels of efficiency, etc.

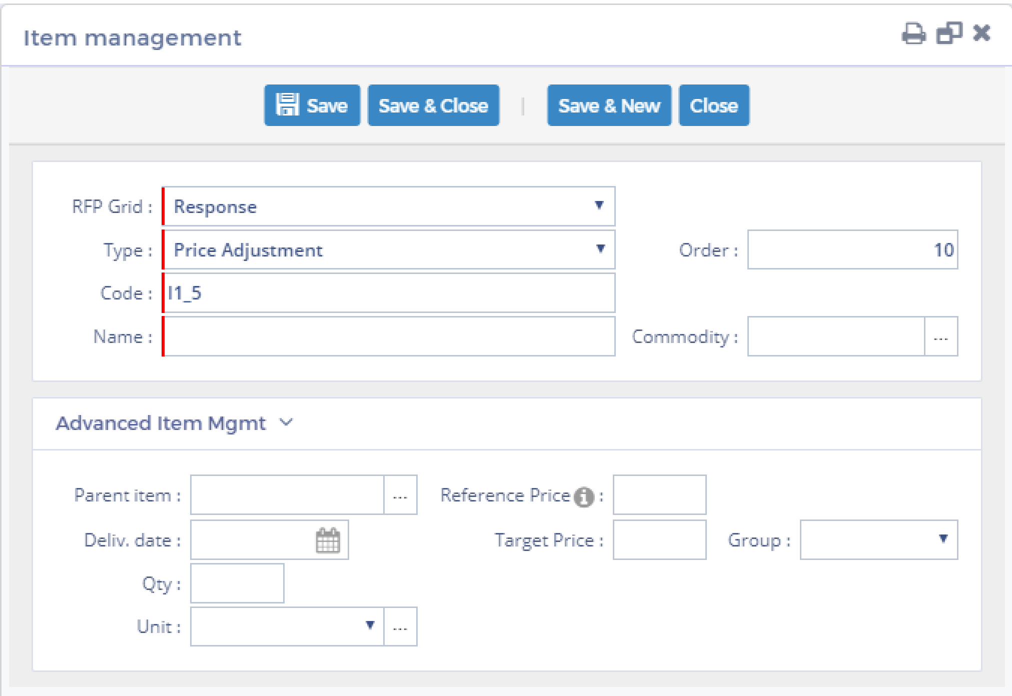
To add a price adjustment item:

1. Click the **Add an item** button.



				OFFICE DEPOT Proposal # 1 (USD)		Staples Propo
Items code	Label	Qty	Award	Unit price	Amount	Unit price
I1_1	Adjustable desks	50.00000		245.00	12,250.00	325.00
I1_2	Chairs - Adjustable lombar support	60.00000		165.00	9,900.00	85.00
I1_3	Book shelves	20.00000		145.00	2,900.00	70.00
I1_4	Fabric Screens 18" * 60"W	50.00000		20.00	1,000.00	30.00
Total					26,050.00	

The *Item management* window will pop up.



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2. Fill in the item's attributes.

Field	***Description***
RFx Grid	When the RFx includes multiple pricing grids, use this drop-down list to select the grid you will add the item to.
Type	In the step *Analyze RFP answers,* only one type of item is available: the Price adjustment type. A Price adjustment item is a cost element that is declared internally by the buyer and remains hidden to suppliers. Price adjustment items are included in the total amount of the proposal.
Code	Code that uniquely identifies the item
Name	Item name
Order	Display order of the item within its group
Commodity	Purchase commodity the item is linked to
Parent item	Attaching an item to a parent item allows you to break down the item into sub-items.
Deliv. Date	Desired delivery date
Qty	Item quantity
Unit	Item UOM
Reference Price	Price used for comparison with incoming offers. Most commonly used are current or budgeted prices.
Target Price	Price you're aiming as an outcome of the RFP
Group	You can attach a price adjustment item to an existing group of items (created at the time the pricing grid was designed, during the preparation stage of the RFx).

3. Click the **Save and close** button.
   The item is added to the grid.
4. For each proposal, enter the amount of the price adjustment item (if relevant).
   The currency is linked to the proposal; thus, you must quote price adjustment items in the same currency as the one the supplier used in their proposal (which is displayed in the column header, next to each proposal's label).

Response

				OFFICE DEPOT Proposal # 1 (USD)		Staples Proposal # 1 (USD)	
Items code	Label	Qty	Award	Unit price	Amount	Unit price	Amount
I1_1	Adjustable desks	50.00000		245.00	12,250.00	325.00	16,250.00
I1_2	Chairs - Adjustable lombar support	60.00000		165.00	9,900.00	85.00	5,100.00
I1_3	Book shelves	20.00000		145.00	2,900.00	70.00	1,400.00
I1_4	Fabric Screens 18" * 60"W	50.00000		20.00	1,000.00	30.00	1,500.00
I1_5	Taxes			10			
Total					26,050.00		24,250.00

5 Result(s)

5. **Save**.
   The Price Synthesis table will be refreshed, and the amount of the price adjustment item will be included in the total amount of concerned proposals.

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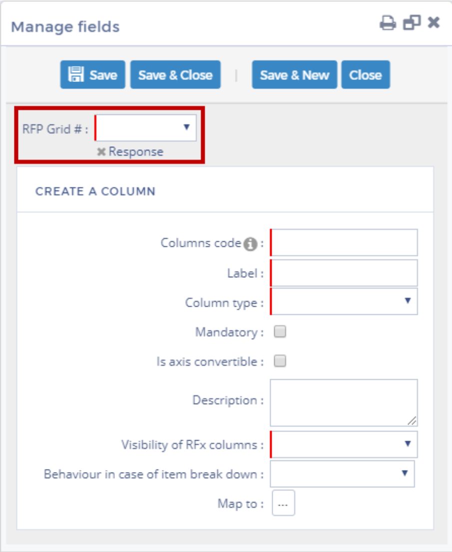
Adding Columns to the Price Comparison Table (Awarding tab)

Should you realize at this stage that the analysis grid is missing a column (for instance, a calculated amount), you can add it now by following this procedure.

1. Access the *Mange fields* screen in one of the following ways:
   - Right-click the grid's column header and select *Add a column.*
   - Click the *Add a column* button. Using this button is practical when your RFx contains more than one pricing grid: the *RFP Grid #* drop down list lets you choose the grids you wish to add the new column to.



2. Select the grids you wish to add the column to (if the *RFP Grid #* field is available)
3. Fill in the fields referring to their definitions on page 82.
4. **Save and Close** to return to the Pricing Grid and see the newly added column. Click **Save and New** to clear the screen and add a new column.

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Downloading Proposals (Proposals tab)

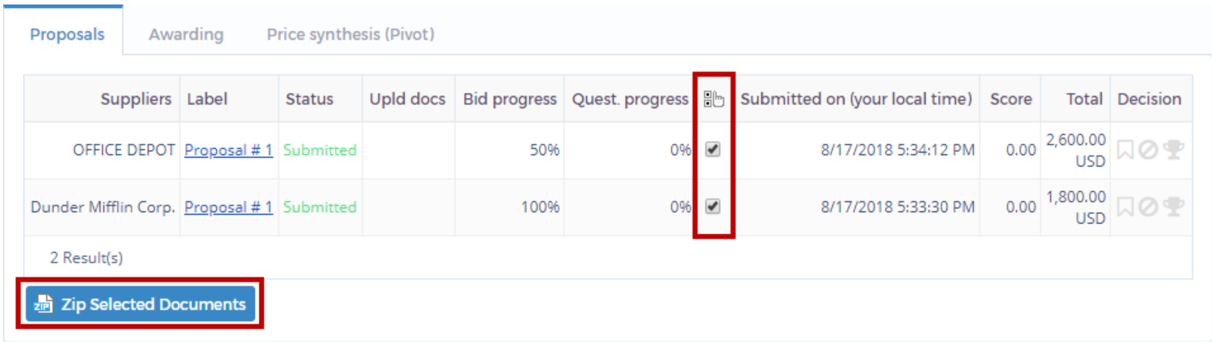
You can download all or selected supplier proposals in a single structured zip archive that includes proposals' financial data, questionnaire response, and any file attachment.

Note: Access to this functionality requires the authorization to view prices ("rfp_price_view").

1. Display the tab P*roposals*.
2. Select the checkbox of proposals that you wish to download (to select all proposals), then click on the button **Zip Selected Documents** located below the list of proposals.

The selected proposals are downloaded as a single ZIP file that contains a folder for each supplier, and within it, a folder for each proposal.

All the documents that the supplier attached using the *Documents* tab in their proposal are included in the archive, as well as the files linked to each item, answers to the pricing table (Excel format), and response to the questionnaire (Excel format).



Exploring Possible Award Scenarios (Award Simulations)

Awarding is performed in the *Awarding* tab of the *Analyze & Award* step.

Depending on how you want to award, you can choose among a number of approaches. You can:

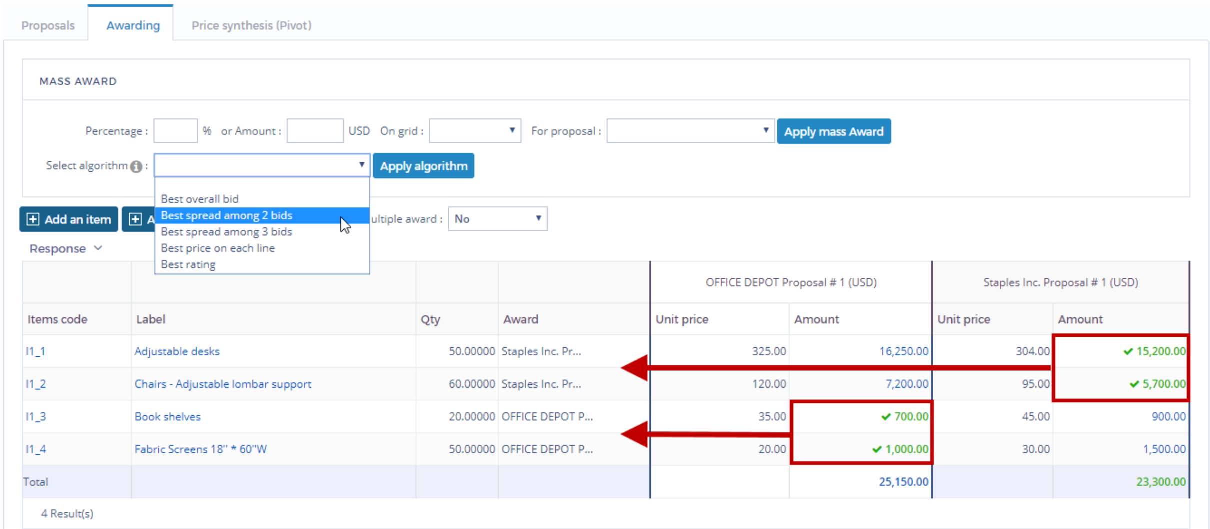
- Apply a pre-defined award algorithm (➔p.152)
- Award one or more items to a single supplier (➔p.153)
- Make split awards in quantity, percentage or amount (➔p.154)
- Award an RFx without item (➔p.154)

Applying a Pre-Defined Award Algorithm

The drop-down menu *Select algorithm* offers a number of pre-defined award scenarios:

- Best overall bid: awards all items to the supplier with the overall lowest price.
- Best spread among 2 bids: spreads the items between the 2 suppliers with the best price.
- Best spread among 3 bids: spreads the items between the 3 suppliers with the best price.
- Best price on each line: awards each item to the supplier with the lowest price for that particular item.
- Best rating: awards all items to the best rated supplier.

To apply an award algorithm, selected it from the drop-down menu, and then click the **Apply algorithm** button to update the Award column.



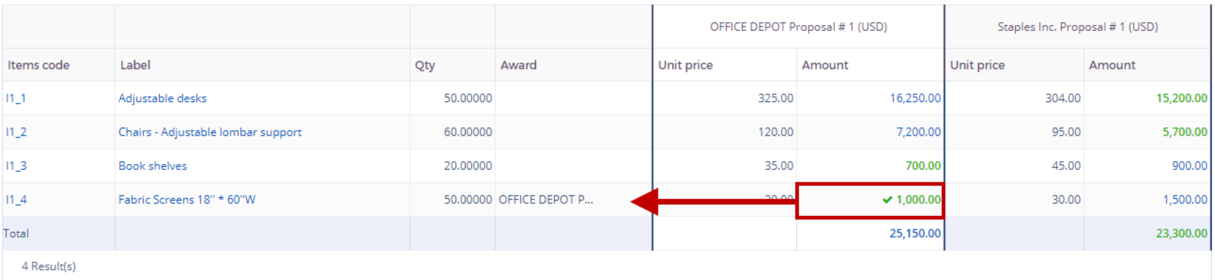
				OFFICE DEPOT Proposal # 1 (USD)		Staples Inc. Proposal # 1 (USD)	
Items code	Label	Qty	Award	Unit price	Amount	Unit price	Amount
I1_1	Adjustable desks	50.00000	Staples Inc. Pr...	325.00	16,250.00	304.00	✔ 15,200.00
I1_2	Chairs - Adjustable lombar support	60.00000	Staples Inc. Pr...	120.00	7,200.00	95.00	✔ 5,700.00
I1_3	Book shelves	20.00000	OFFICE DEPOT P...	35.00	✔ 700.00	45.00	900.00
I1_4	Fabric Screens 18" * 60"W	50.00000	OFFICE DEPOT P...	20.00	✔ 1,000.00	30.00	1,500.00
Total					25,150.00		23,300.00

4 Result(s)

The award scenario is saved to the current scenario. For more information about scenarios, see page 155.

Awarding One or More Items to a Single Supplier

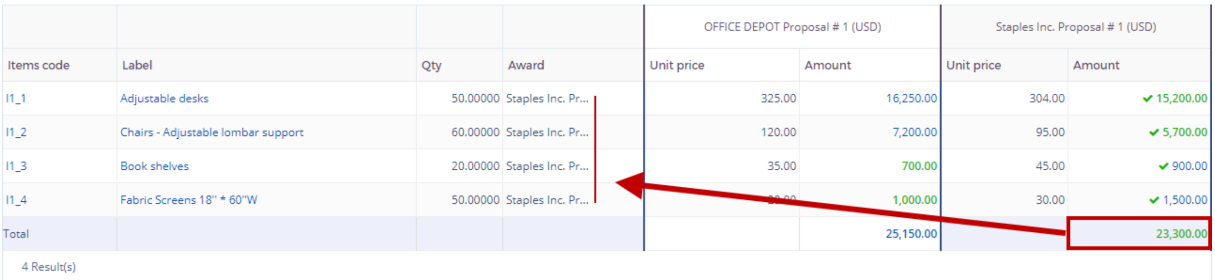
To award an item to a supplier, click this supplier's price offer for the item. The proposal name is displayed in the *Award* column for said item.



				OFFICE DEPOT Proposal # 1 (USD)		Staples Inc. Proposal # 1 (USD)	
Items code	Label	Qty	Award	Unit price	Amount	Unit price	Amount
I1_1	Adjustable desks	50.00000		325.00	16,250.00	304.00	15,200.00
I1_2	Chairs - Adjustable lombar support	60.00000		120.00	7,200.00	95.00	5,700.00
I1_3	Book shelves	20.00000		35.00	700.00	45.00	900.00
I1_4	Fabric Screens 18" * 60"W	50.00000	OFFICE DEPOT P...	20.00	✔ 1,000.00	30.00	1,500.00
Total					25,150.00		23,300.00

4 Result(s)

To award all items to a single supplier, click this supplier's total price offer. The proposal name is displayed in the *Award* column for all items.



				OFFICE DEPOT Proposal # 1 (USD)		Staples Inc. Proposal # 1 (USD)	
Items code	Label	Qty	Award	Unit price	Amount	Unit price	Amount
I1_1	Adjustable desks	50.00000	Staples Inc. Pr...	325.00	16,250.00	304.00	✔ 15,200.00
I1_2	Chairs - Adjustable lombar support	60.00000	Staples Inc. Pr...	120.00	7,200.00	95.00	✔ 5,700.00
I1_3	Book shelves	20.00000	Staples Inc. Pr...	35.00	700.00	45.00	✔ 900.00
I1_4	Fabric Screens 18" * 60"W	50.00000	Staples Inc. Pr...	20.00	1,000.00	30.00	✔ 1,500.00
Total					25,150.00		23,300.00

4 Result(s)

In both cases, the award scenario is saved to the current scenario. For more information about scenarios, see page 155.

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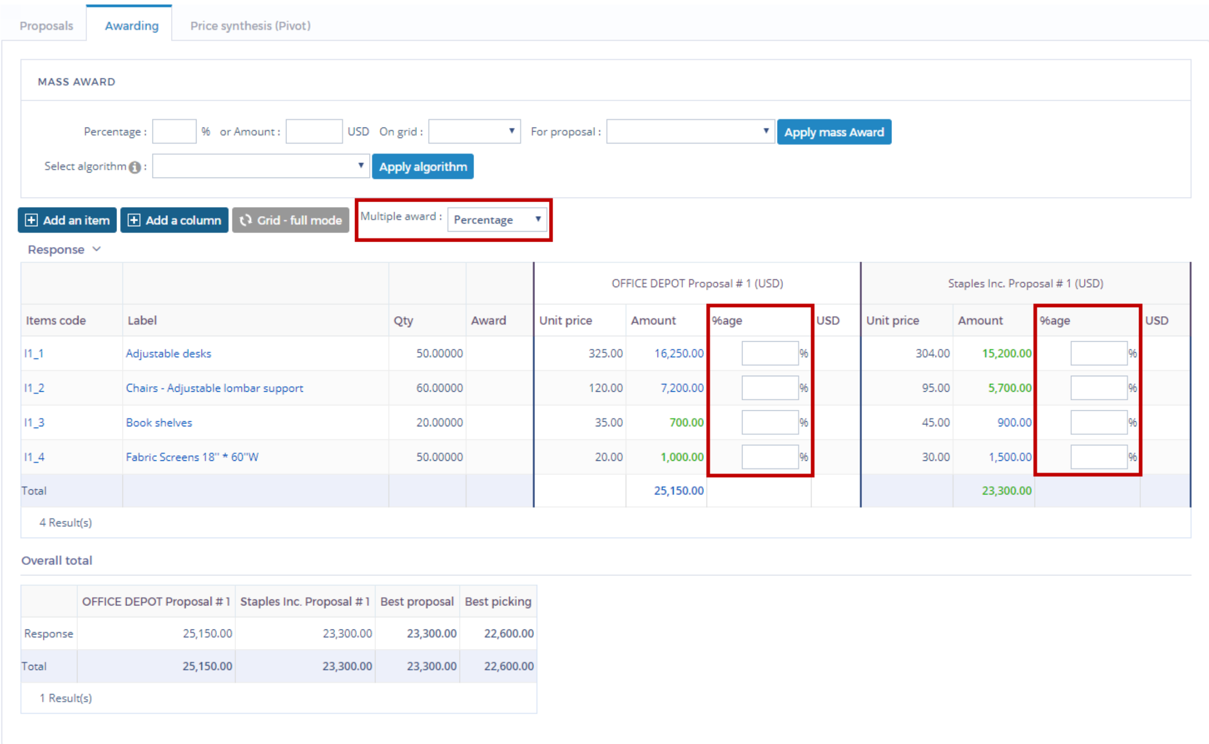
Making Split Awards in Quantity, Percentage or Amount

You can make split awards either in quantity, percentage, or amount.

In the **Multiple award** drop-down list, select the type of split award you want to make. Input boxes open up in the table below.

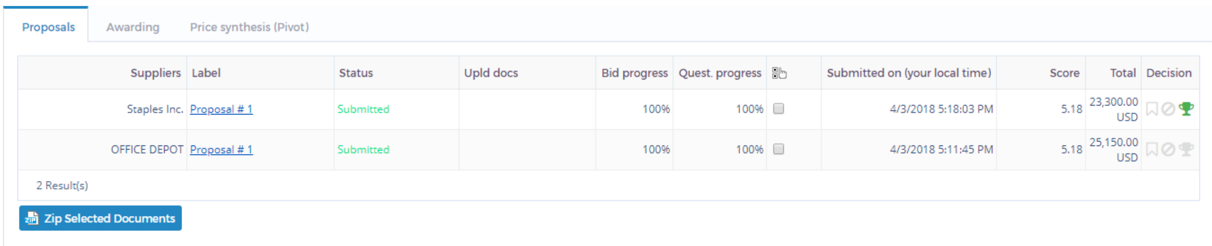


Enter the quantity/percentage/amount you want to award to selected suppliers.

Click **Save**. The award scenario is saved to the current scenario. For more information about scenarios, see page 155.

Awarding an RFx Without Item

To award a proposal in an RFx without item, you will have to go the *Proposals* tab and click the *Award* icon in the *Decision* column.



To unaward, click the *Award* icon again.

> ***Note***
>
> The *Award* icon can also be used in the context of an RFx <u>with</u> items. In that case, clicking this icon will:
>
> - Award all items to the supplier whose icon you're clicking
> - Undo any previous award made in the *Awarding* tab
> - Save the new award scenario to the current scenario (For more information about scenarios, see page 155.)

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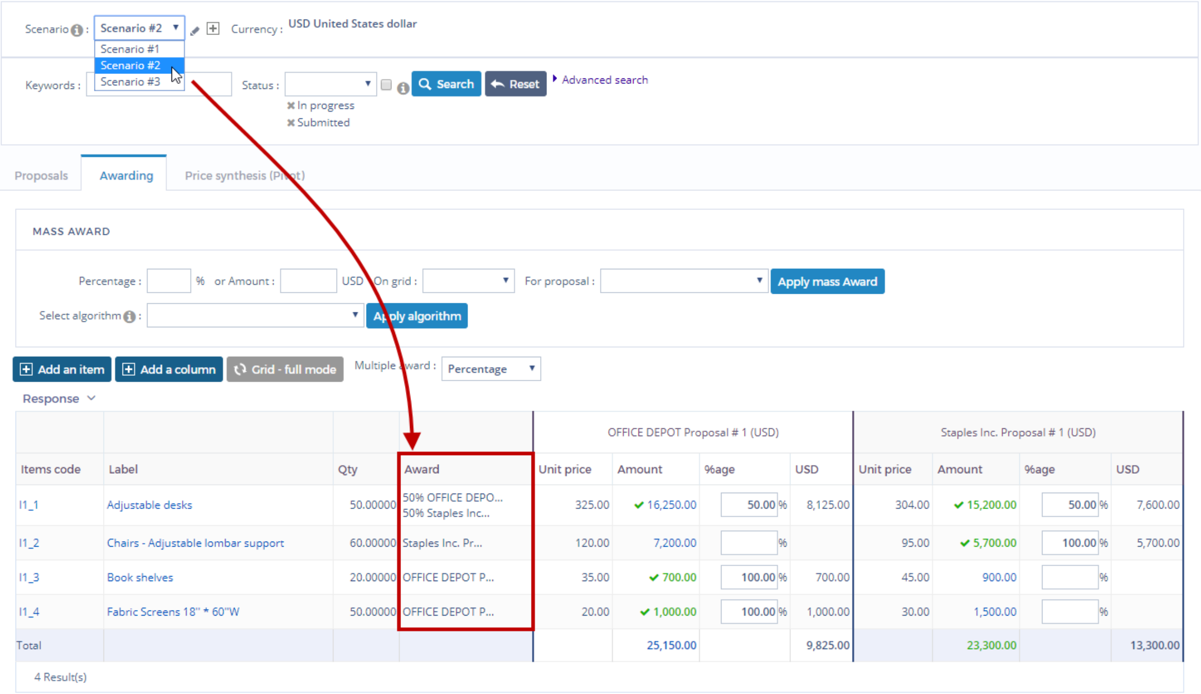
Saving Multiple Award Scenarios

When you award items to suppliers, the name of the awarded proposals will be displayed in the *Award* column in the *Awarding* tab. The particular set of awarded proposals listed in this column (for each awardable item) represents an award scenario and is automatically saved under the name “Scenario #1”.



You can rename scenarios to your convenience by clicking the *Edit* icon positionned to the right of the *Scenario* drop-down list.

You may save multiple scenarios. To create a new scenario, click the *Plus Sign* next to the *Edit* icon , and then award items.

Keep in mind that each time you make an award, it is automatically saved to the current scenario (except in the case of multiple/split awards, which require you to click the **Save** button), thus erasing any previous award scenario. So, if you want to save a scenario while retaining the previous, create a new scenario before awarding.

Once you have saved several scenarios, you can toggle from one scenario to another simply by selecting the desired scenario in the *Scenario* drop-down list.

Using the Pivot Table

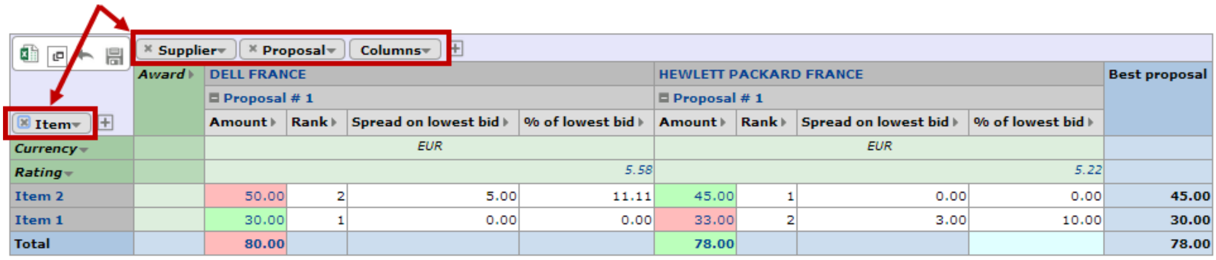
Customizing/Resetting the Price Synthesis table

Selecting the Axes of the Pivot Table

Depending on your needs, you may choose to include more or less information in the Price Synthesis table.

The labels of selected table axes are displayed above column and row headers.

Pivot table axes

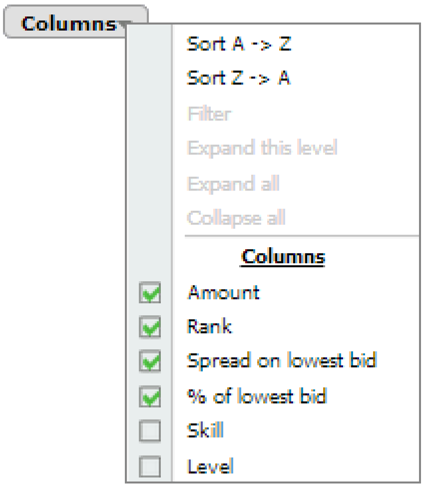


	Award	DELL FRANCE				HEWLETT PACKARD FRANCE				Best proposal
		Proposal # 1				Proposal # 1				
Item		Amount	Rank	Spread on lowest bid	% of lowest bid	Amount	Rank	Spread on lowest bid	% of lowest bid	
Currency		EUR				EUR				
Rating					5.58				5.22	
Item 2		50.00	2	5.00	11.11	45.00	1	0.00	0.00	45.00
Item 1		30.00	1	0.00	0.00	33.00	2	3.00	10.00	30.00
Total		80.00				78.00				78.00

Available axes that are currently not displayed can be added to the table as rows or columns, by clicking the icon ⊞.

Displayed axes can be deleted by clicking their Delete icon ✖.

For each axis, an arrow ▾ gives you access to the list of displayable data.



To display/hide data, enable/disable the corresponding checkbox.

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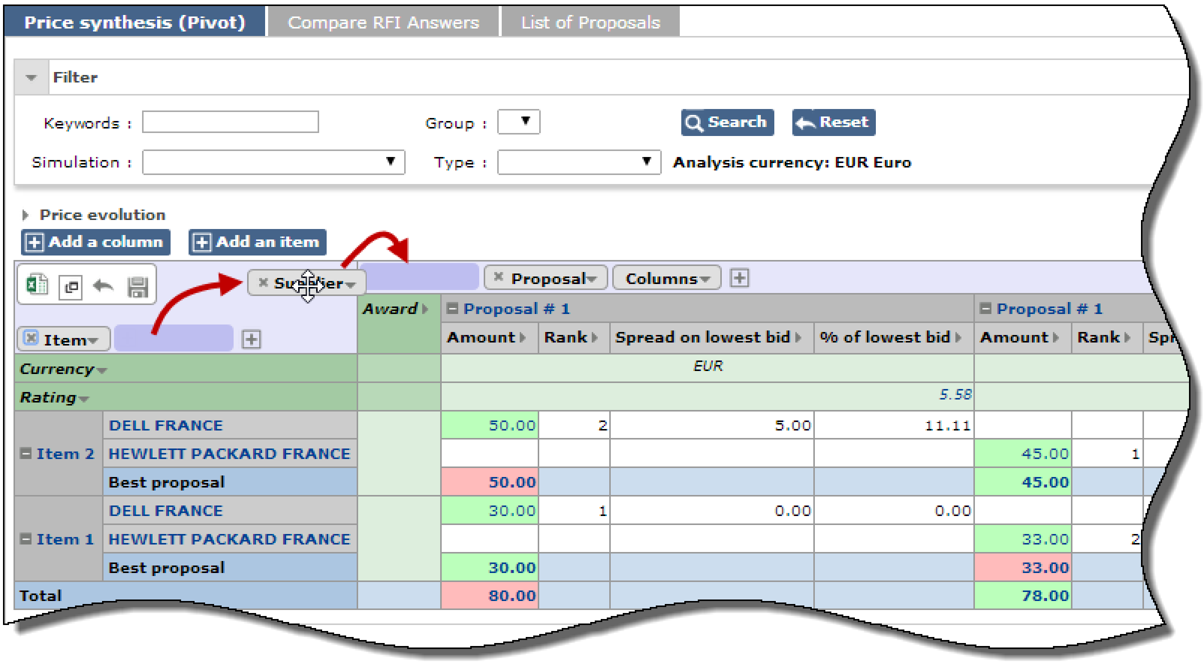
Rearranging Rows and Columns in the Pivot Table

You can rearrange the order and layout in rows and columns of table axes by simply dragging and dropping dimension labels.

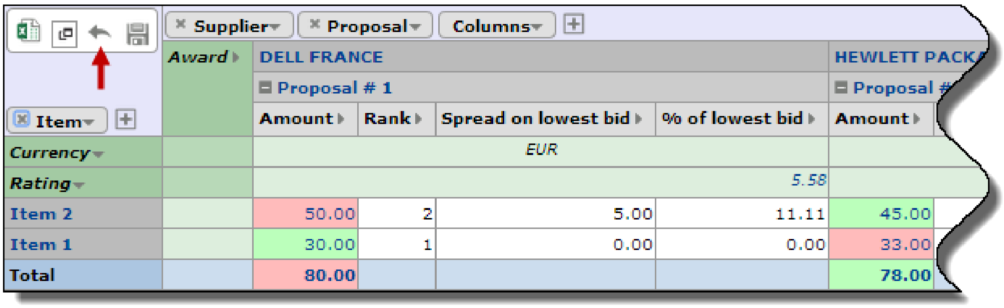
To do so, place your mouse cursor on the chosen dimension label; when your cursor takes on the shape of a cross, click the label and drag it to its new location, while keeping the mouse button pressed; drop the label on its new location by releasing the mouse button when a blue drop area appears.



The table data will be rearranged according to the new layout of axes.

Resetting the Pivot Table

1. Click the icon *Reset settings* located in the upper left part of the table.



A message will display, prompting you to confirm your request.

2. Click **OK**.

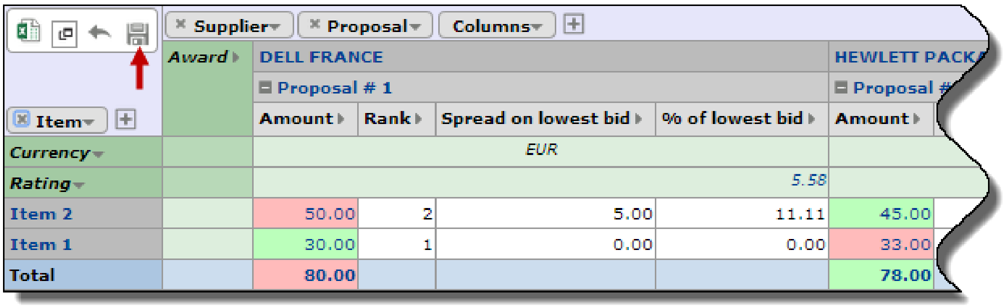
Saving a Particular Setup of the Pivot Table in an RFx Template

Access to this functionality requires a specific authorization (auth_adm).

You have the ability to save the current table setup to the RFx template that is associated with the current RFx type.

Any new RFx of that same type that will be created from then on will default to the table setup in the template.

1. To save the current table setup, click the *Save settings in template* icon located in the upper left part of the table.

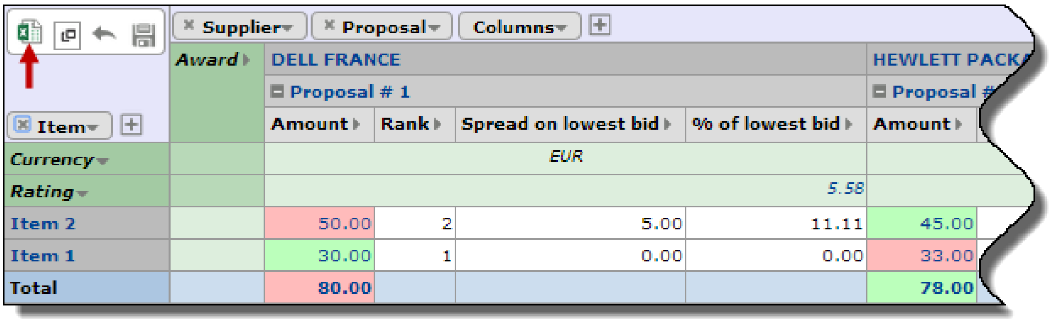


   A message will display, prompting you to confirm your request.

2. Click **OK**.

Downloading the Price Synthesis in Excel Format

Click the *Excel* icon located in the upper left part of the table.



The table will be downloaded in Excel format to your computer following the procedure

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Good to Know About the Pivot Table

Bidding Currencies

When the Sourcing Project allows multiple bidding currencies, proposals (and including items if quotation grids are multi-currency enabled at item level) can be submitted in various currencies. In the step *Analyze RFP answers*, the various bidding currencies are converted to the reference currency using the exchange rates defined in the *Setup currencies* step.

There are 3 possible cases:

- Single-currency RFx: Only one currency is accepted, and all participating suppliers must bid using this currency.
- Multi-currency RFx and Single-currency proposal: Each supplier chooses the currency they will bid in among the allowed bidding currencies. The *Price Synthesis* table shows the chosen currency for each proposal; the items' unit prices are quoted in the proposal's currency, while all calculated amounts are converted to the reference currency (calculation detail in tooltip).
- Multi-currency RFx and Multi-currency proposal: Suppliers have the ability to quote each separate proposal item in a distinct bidding currency. The *Price Synthesis* table shows the chosen currency for each proposal; the items' unit prices are quoted in their respective currency; all calculated amounts are converted from the item's currency to the reference currency (calculation detail in tooltip).

Proposals Canceled and Replaced

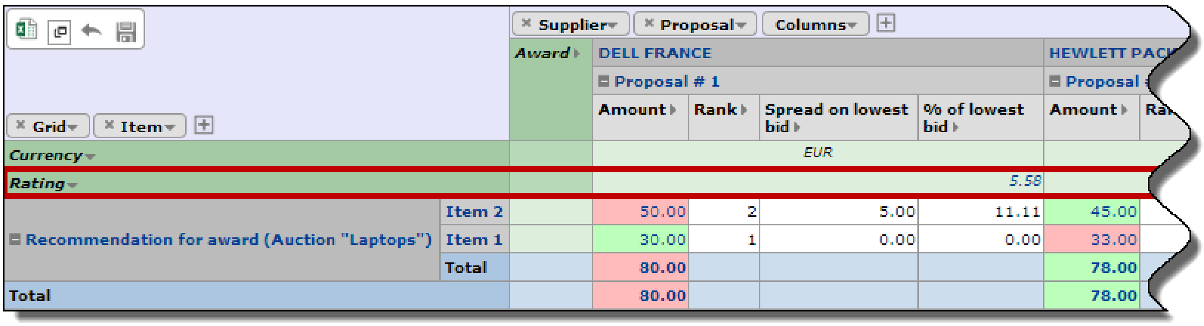
Invited suppliers have the ability to cancel and replace their proposals.

By default, these proposals are not displayed in the *Award* tab, however, this is configurable.

Proposal Evaluation Rating

The display of proposal evaluation ratings in the Price Synthesis table is defined through configuration (parameter: rfp_display_rating_in_awards, activé en standard).

When enabled, this parameter will display a *Rating* column/row with an average of received ratings for each proposal.



		Award	DELL FRANCE				HEWLETT PAC	
			Proposal # 1				Proposal	
			Amount	Rank	Spread on lowest bid	% of lowest bid	Amount	Ra
Currency			EUR					
Rating						5.58		
Recommendation for award (Auction "Laptops")	Item 2		50.00	2	5.00	11.11	45.00	
	Item 1		30.00	1	0.00	0.00	33.00	
	Total		80.00				78.00	
Total			80.00				78.00	

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Best Proposal and Best Picking Indicators

The *Price Synthesis* table can include 2 indicators (*Overall total* frame): Best bid and Best picking.

Overall total

Grid	DELL FRANCE Proposal # 1	HEWLETT PACKARD FRANCE Proposal # 1	Best bid	Best picking
	6000.00	5940.00	5,940.00	5,900.00
TOTAL	6,000.00	5,940.00	5,940.00	5,900.00

1 Result(s)

The display of these indicators is defined through configuration (parameter: rfp_display_best_proposal_option).

In the standard version of the application, only the *Best Bid* indicator is displayed (parameter value: best_bid).

The *Best picking* indictor presents the best combination of bids at item level. It applies the following consolidation rules:

- For a given item, blank responses are ignored (not counted as zero).
- Items created by suppliers (supplier-specific), are ignored.

Please note: The *Best picking* indictor will only make sense with full responses (all rows completed). If you give suppliers the ability to create items and to leave rows unanswered in the response grid, the *Best picking* may turn out to be more expensive than the *Best bid* (for instance, an item row left blank in a response grid will lower the *Best bid* indicator, but not the *Best picking* indicator). A workaround to that problem would be to ignore partial responses (shortlisting only complete proposals).

Confirming the Final Award Scenario

Once you have selected the optimal scenario, you need to confirm it.

To confirm the current scenario, click the **Confirm Award** button located in the action bar, and then click **OK** in the message box that is displayed.

Once the scenario is confirmed:

- Award selections will be frozen, and you will not be able to change your award like before: the simulation will be disabled.
- An **Unvalidate** button becomes available.

At this stage, if you need to change the award, you first need to unvalidate the current award by clicking the **Unvalidate** button (clears all award selections in the *Award* column)

Continuing the Negotiations

Instead of awarding the lots after issue of the the first round of RFx, the buyer (Sourcing project owner) may choose to pursue further negations by creating another round (refer to page 73).

When the Auction module is available and the Auction step is included in the type of the current sourcing project, creating an Auction is another way to continue negotiations.

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RFx FINALIZATION

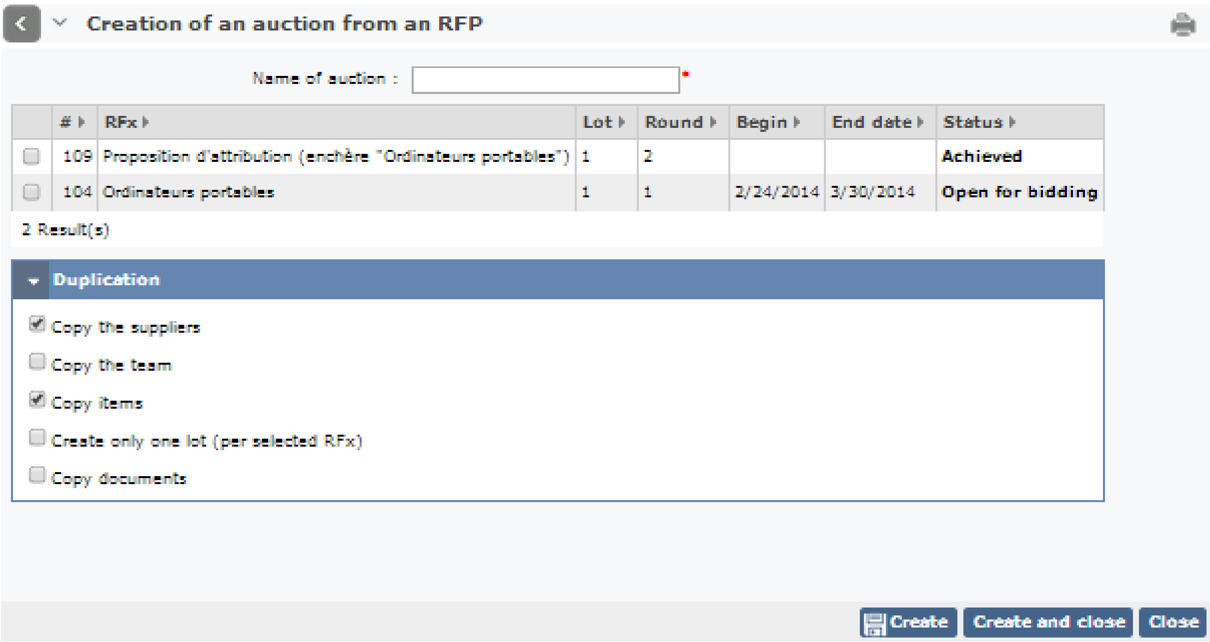
REVERSE AUCTIONS Step

This section explains how to create a reverse auction from a sourcing project. For more information on setting up the auction and its process, refer to the manual on the Auction module.

Creating an Auction From an RFx

1. In the Project, select the step *Auction*.
2. Click on **Create auction** on the action bar.

   The displayed window has 3 sections:
   - A field entry section allowing the user to label the new auction
   - A list of rounds/lots included in the RFx from which the auction will be created
   - The list of elements you may transfer



3. Label your Auction.
4. Select the checkbox of the round/lot from which you will create your auction. (You can select multiple lots).
5. In the section *Duplication*, select the elements to be transfered from the RFx to the auction (suppliers, team, articles, documents).

Option	***Description***
Copy the suppliers	All the suppliers specified in the Supplier step will be transfered The suppliers transfered are determined by the relevant lots in the RFx (*Invited Suppliers* tab of the RFx). The best proposal from each supplier is defined by their *Initial Bid* for each lot. The initial bid allows to detemine the *Starting Bid* of the suppliers. For more information on the configuration of lots, refer to the Auctions manual. The best proposal from each supplier is imported from the *Total* column in the RFx pricing table.
Copy the team	All team members selected in the *Team* step are added to the auction. It is up to the sourcing project owner to attribute user profiles to the team. The project owner will automatically be added with the profile *Owner* to the auction.

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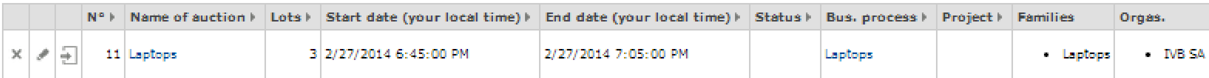
Copy items	All the items for bid listed on the tab *Items* of the *RFx* step are added to the auction. If you create an auction from different lots, all the items from those different lots are added. The items added to the auction are determined by the configuration of the lots in the RFx (see below)
Create only one lot (per selected RFx)	By default, the application only generates a single lot. The option *Creating a single lot* allows you to create one lot containing all the items of the RFx selected. This option will become available if the RFx contains more than one item. If the auction is created from multiple lot of RFx, the application will create one auction lot per RFx lot as the items were defined in the RFx.
Copy documents	All documents listed on the tab *Documents* of the *RFx* step are added to the auction. By default, the documents are not assigned to any lots. It is up to the user to make that assignment.

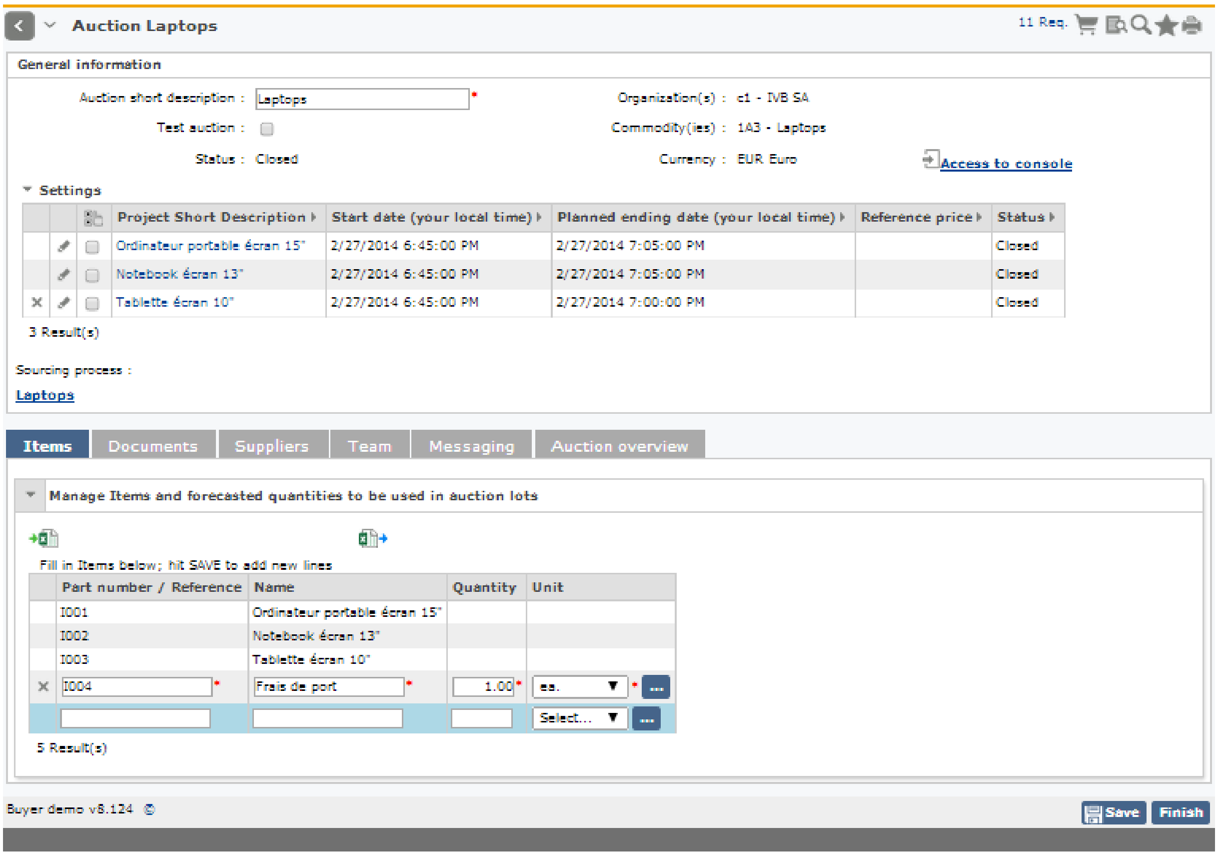
6. Click on **Save and close**.
   The auction is created and is labelled in the tab *Auctions*.



The icon allows you to view the auction folder.

The icon allows you to view auction console where the auction takes place.

7. Click on *Modification* of the auction to view the auction folder and complete it.



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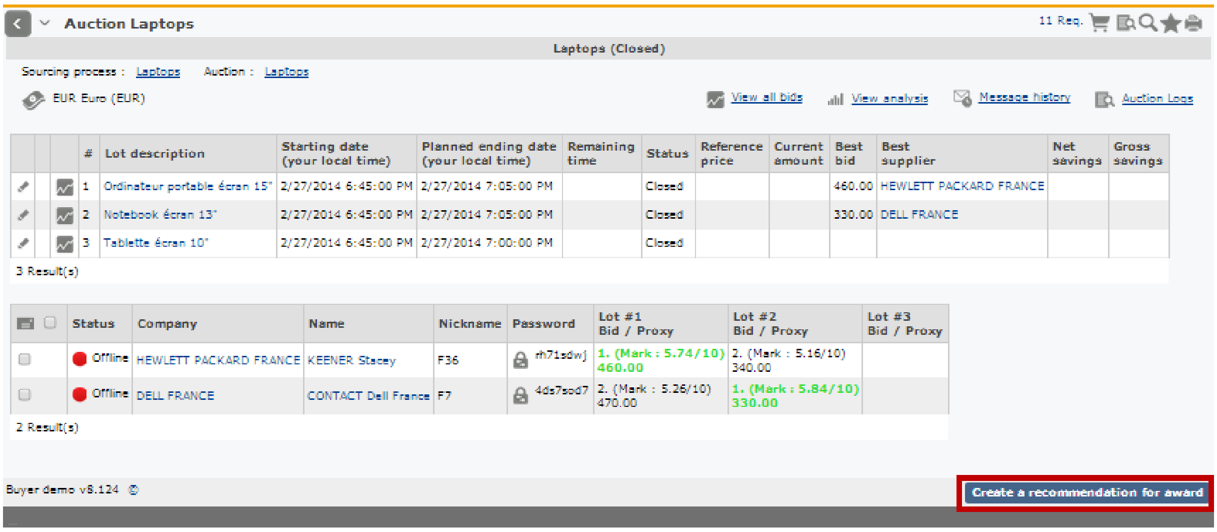
Transferring the Final Results of an Auction to a New RFx Round

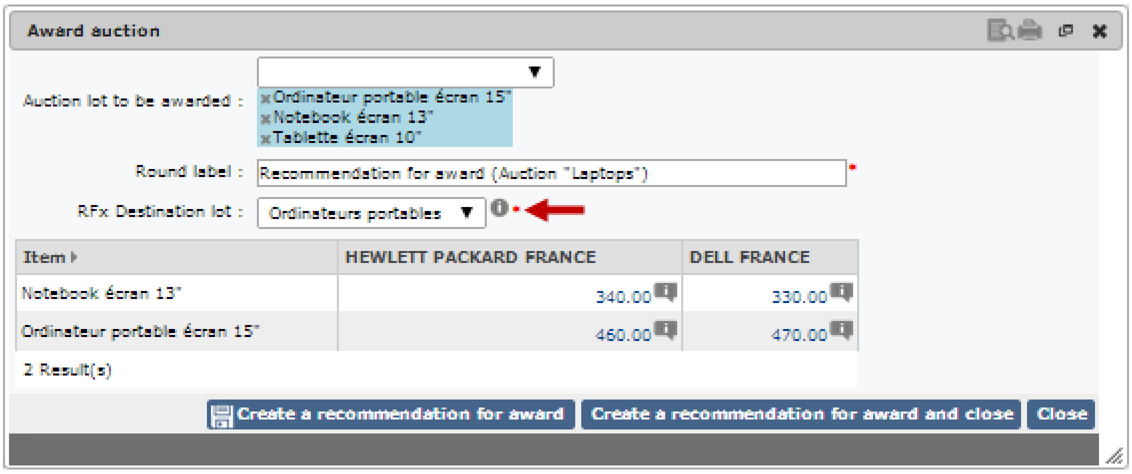
When the auction comes to an end, this function enables you to pull the final auction data to the RFx (creation of the round, supplier proposals and the award scenario according to auction results).

Note: Only financial data will be transferred.

1. In the bidding console, click the button **Create a recommendation for award** (becomes available when the auction is over).



2. Select the *RFx Destination lot* (lot in which a new round will be created).

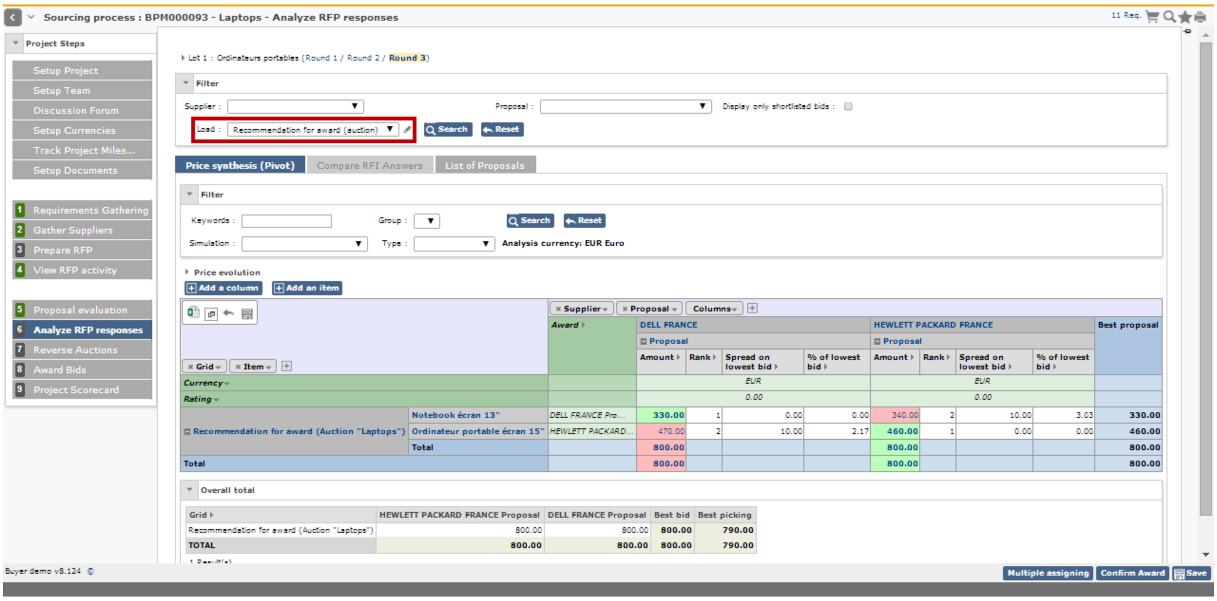


3. Click the button **Create a recommendation for award and close**.

   This action automatically triggers the following operations:

   - In the *Prepare RFP* step, a new round is created for the selected lot. By default, the round will be named according to the following convention: Recommendation for award (Auction "[*Auction name*]").

     If the option *Item Level Bidding* is enabled in the auction lot, there will be as many items created in the RFx as there are items in the auction lot. If the option is disabled, only one item will be created.
   - In the step *View RFP activity*, one proposal will be created for each supplier participating in the auction, with their bidding price as the proposal's amount.
   - In the step *Analyze RFP answers*, an award scenario named *Recommendation for award (Auction)* will be created, according to which the RFx lot will be awarded to the supplier who won the auction.



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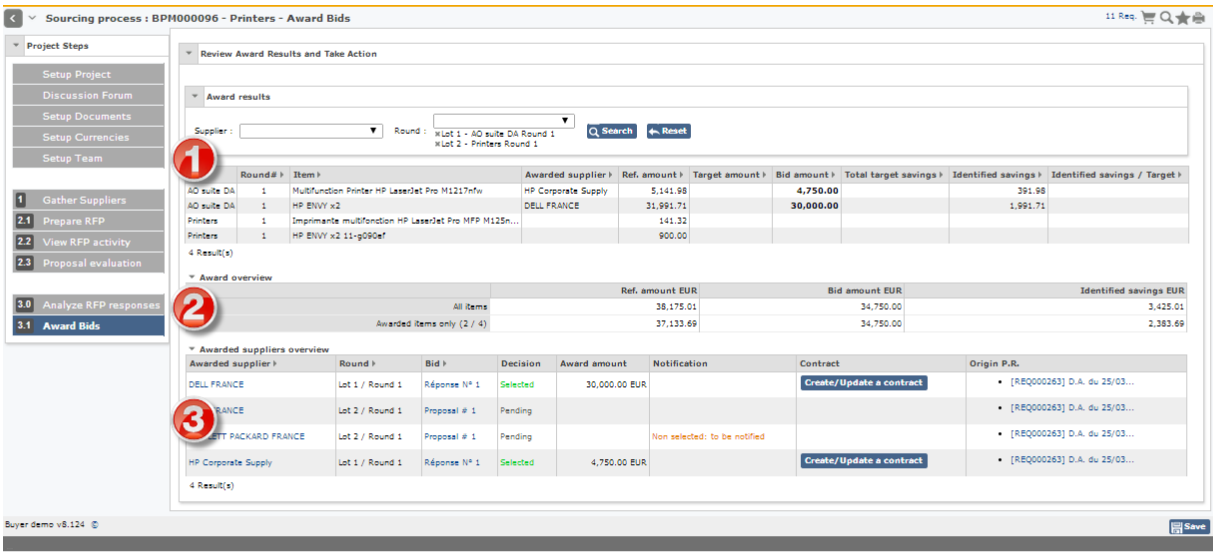
SYNTHESIS Step

The *Synthesis* step gives you an at-a-glance view of the RFP outcome.

Understanding the Interface

The *Award Bids* step consists of 3 sections:

1. **Award results**: For each item, this table summarizes the results from the RFx in terms of pricing and total amount. If the reference pricing and the targeted pricing have been entered, their comparative results will be displayed.
2. **Award Overview**: This table shows a global synthesis of amount and saving (reference / targeted / attained) for the RFx (all items).
3. **Awarded suppliers overview**: This table shows a synthesis of the amount attributed by each supplier, allowing the user to notify the non-selected suppliers.



Notifying Non-Selected Suppliers

1. Select *Award Bids* step.
2. In the column *Notification* of the section *Supplier synthesis*, click on the link: *Not selected: to be notified*

Awarded suppliers overview

Awarded supplier	Round	Bid	Decision	Award amount	Notification
Covidien	Lot 1 / Round 1	Proposal # 1	Selected	61,690.00 USD	
Horizon - Austin	Lot 1 / Round 1	Proposal # 1	Selected	19,280.00 USD	
Horizon - Austin	Lot 1 / Round 1	Copy of Proposal # 1	Not selected		
Horizon - Austin	Lot 1 / Round 1	USD Quote	Selected	16,560.00 USD	
Vygon	Lot 1 / Round 1	Proposal # 1	Not selected		Non selected: to be notified

5 Result(s)

A message window appears

3. You can modify the subject and content of message
4. Click on **Send**.

The column *Notification* is updated:

Vygon	Lot 1 / Round 1	Proposal # 1	Not selected		Not selected: Notified

You can view the sent message by clicking on the tag *Non-selected: Notified*.

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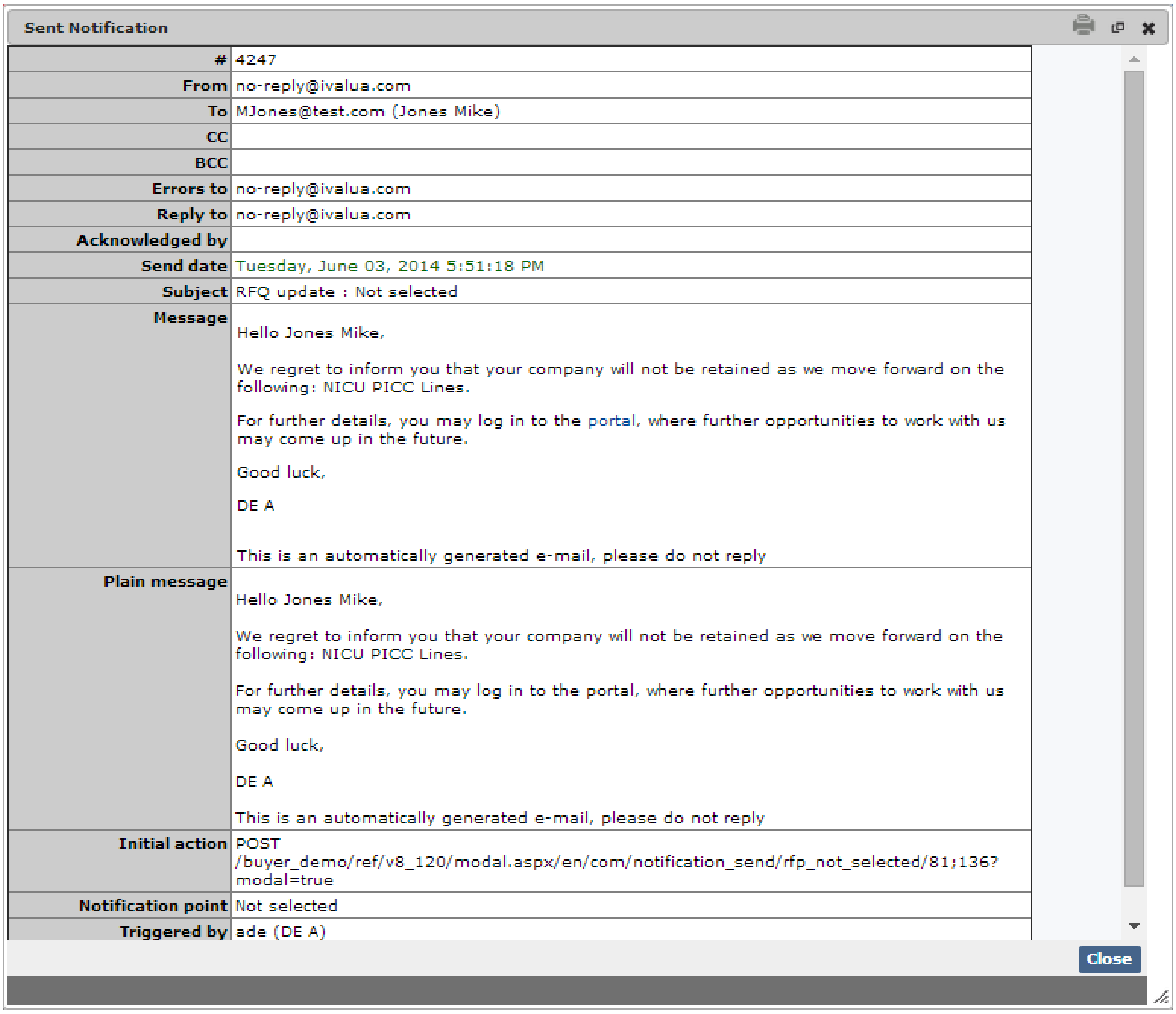


Sent Notification

#	4247
From	no-reply@ivalua.com
To	MJones@test.com (Jones Mike)
CC	
BCC	
Errors to	no-reply@ivalua.com
Reply to	no-reply@ivalua.com
Acknowledged by	
Send date	Tuesday, June 03, 2014 5:51:18 PM
Subject	RFQ update : Not selected
Message	Hello Jones Mike, We regret to inform you that your company will not be retained as we move forward on the following: NICU PICC Lines. For further details, you may log in to the portal, where further opportunities to work with us may come up in the future. Good luck, DE A This is an automatically generated e-mail, please do not reply
Plain message	Hello Jones Mike, We regret to inform you that your company will not be retained as we move forward on the following: NICU PICC Lines. For further details, you may log in to the portal, where further opportunities to work with us may come up in the future. Good luck, DE A This is an automatically generated e-mail, please do not reply
Initial action	POST /buyer_demo/ref/v8_120/modal.aspx/en/com/notification_send/rfp_not_selected/81;136?modal=true
Notification point	Not selected
Triggered by	ade (DE A)

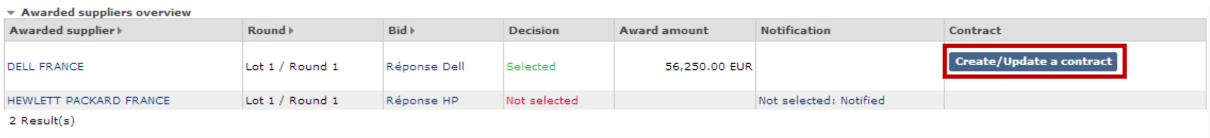
Close

Contract Creation

Creating or Updating a Contract Based on an Award Proposal

For each supplier who has been awarded items in the *Analyze RFP answers* step, you can create a new contract or update an existing one in the *Award Bids* step.

1. In the Sourcing Project, select the step *Award Bids* step.
2. In the *Awarded suppliers overview* section, click the button **Create/Update a contract** associated with the relevant supplier.



Awarded suppliers overview

Awarded supplier	Round	Bid	Decision	Award amount	Notification	Contract
DELL FRANCE	Lot 1 / Round 1	Réponse Dell	Selected	56,250.00 EUR		Create/Update a contract
HEWLETT PACKARD FRANCE	Lot 1 / Round 1	Réponse HP	Not selected		Not selected: Notified	

2 Result(s)

The window *Create/Update a contract from a proposal* will display.

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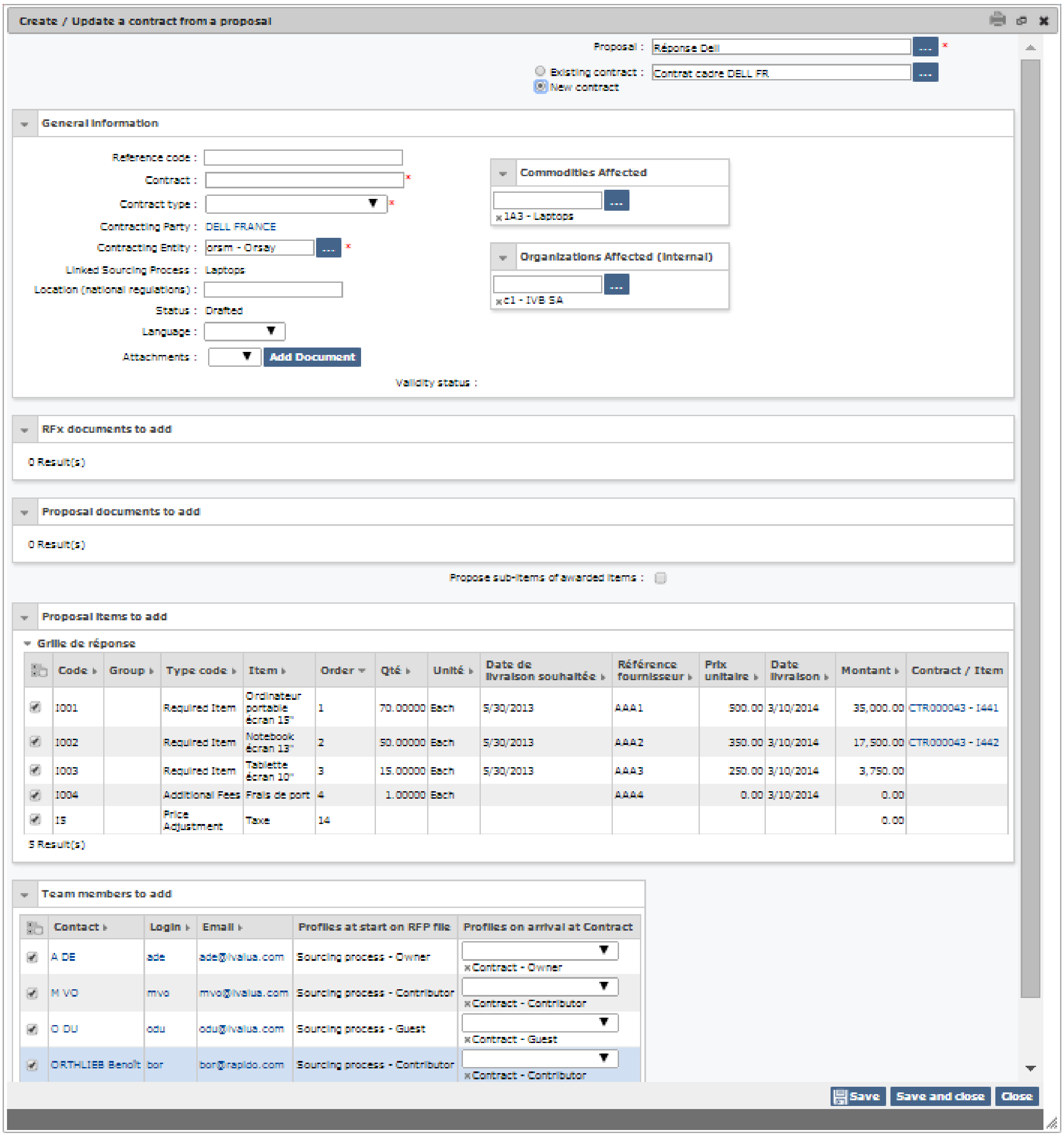

3. In the upper part of the window, select *Existing contract* or *New contract* to indicate whether you want proposal items to be added to an existing contract or a new one.

   If you choose to add them to a new contract, you need to fill in the *General information* frame.

4. Below the *General information* frame, the window lists the proposal items that you may transfer to the contract by category: RFx documents, proposal documents, proposal items and team members. By default, all available items are selected. Deselect the items that you do not want to transfer to the contract.

   Profiles assigned to contract team members transferred from the Sourcing Project

   The contract creator will be added to the contract team with an Owner profile.

   Other users' profiles will be assigned according to a mapping table defined by the Administrator.

   If the user has one or more Sourcing Project profiles that are mapped with Contract profiles, they will be assigned the mapped profiles. They will loose unmapped profiles.

   If the user has no mapped profile, they will be assigned the default contract profile. If no default prodile has been defined for contracts, the user will be added to the contract team without any local profile.

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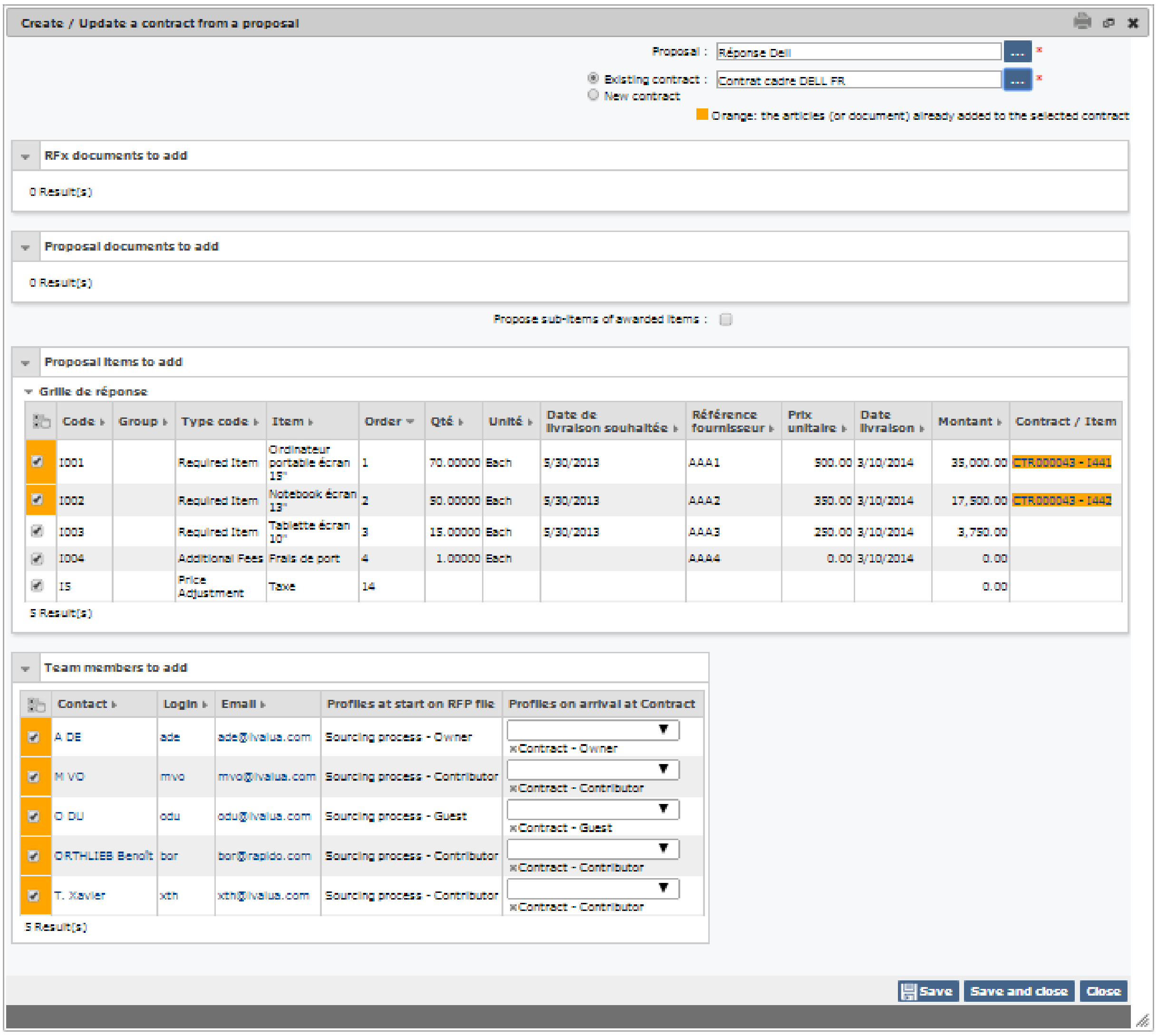
If there is a mapping defined between the Owner profiles of the Sourcing Project and of the contract: since the contract owner profile can only be assigned once and is automatically assigned to the contract creator, the Sourcing Project Owner will be assigned a Contributor profile in the contract.

When you choose to add proposal items to an existing contract, items that have already been added are signaled in orange.



5. Click **Save** to create or update the contract.

   For further information on contract creation, please refer to the Contracts User Manual.

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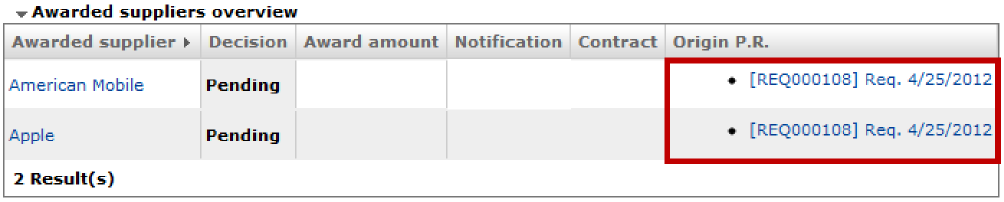
Purchase Requisitions

Updating the Purchase Requisition the Sourcing Project Was Launched From

When a Sourcing Project was created from a purchase requisition, IVALUA allows you to update that requisition according to the RFx's award proposal.

1. In the project, select *Award Bids* step.



Awarded suppliers overview

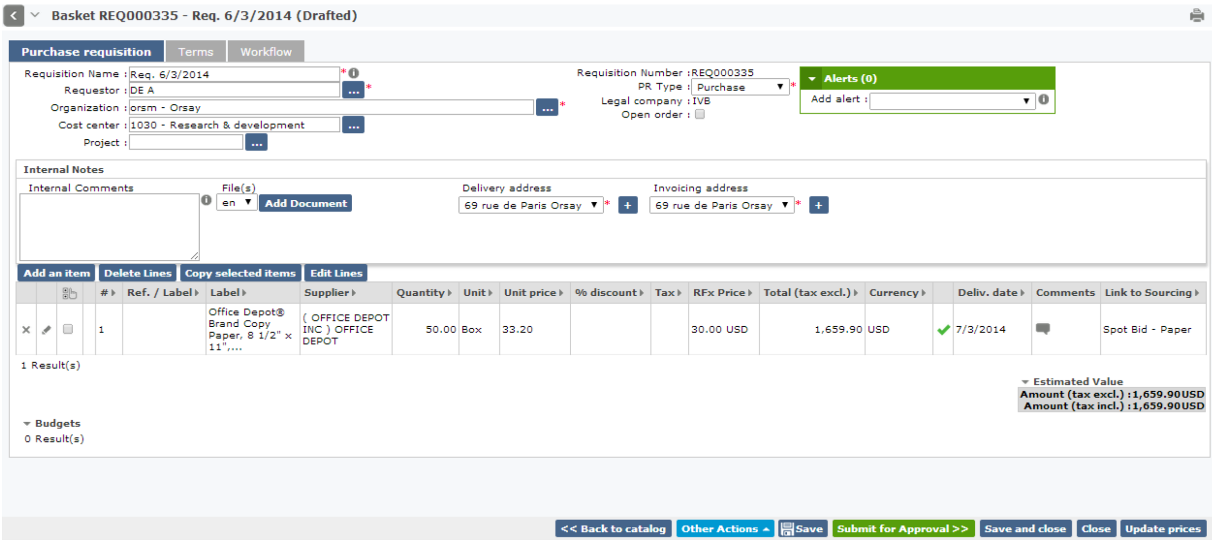
Awarded supplier	Decision	Award amount	Notification	Contract	Origin P.R.
American Mobile	Pending				• [REQ000108] Req. 4/25/2012
Apple	Pending				• [REQ000108] Req. 4/25/2012

2 Result(s)

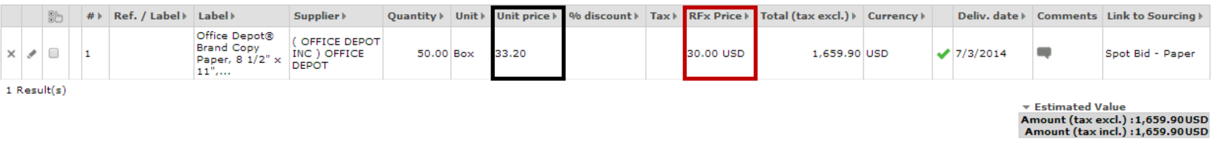
The section *Awarded suppliers overview* shows a link to the original requisition.

2. Click on the original requisition link.

The requisition appears.



The requisition line items included in the RFx indicate a unit price before RFP if it was known, as well as the price achieved through the RFP.



3. Click on the button **Update Prices**.

The window *Update prices after consultation* appears.

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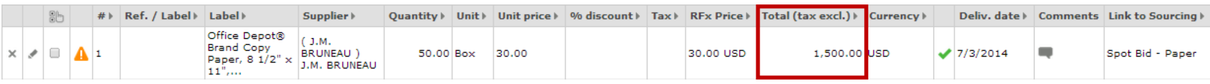
4. Select the checkbox on the row(s) of item(s) you wish to update, and click on **Save and close**.

   A message will prompt your confirmation to the action.

5. Click on **OK**.

   The total amount (without tax) of the row of items is updated with the negociated price according to the requisition.



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